

Rhode Island's Access to Recovery



PROVIDER USER MANUAL

VERSION 1.2
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1-888-600-4777
riatrsupport@kitsolutions.net

KIT Solutions®, LLC
5700 Corporate Drive
Suite 530
Pittsburgh, PA 15237

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TIPS FOR USING THE APPLICATION EFFECTIVELY

Recommended Computer Settings

Screen Resolutions

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 or larger. If your screen resolution is smaller (e.g., 800 x 600 pixels), everything on the screen will appear larger. But, if you use 800 x 600 pixels you will have to scroll more both up and down and left and right to access all the data fields.

Pop-Up Blockers

Modern computer security technology and usability features development have led to pop-up blocking. Although this new feature of Internet browsers, toolbars and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like the RI ATR application require pop-ups to be able to function. If your pop-up blocker is enabled, then there is a possibility that the RI ATR application may not function or appear properly. You should either disable the pop-up blocker while using the RI ATR application (while remembering to enable it, if desired, when not using the RI ATR application) or create exceptions for the pop-up blocker. Although enabling and disabling the pop-up blocker may be cumbersome, it may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your internet browser window. If using Internet Explorer, click the top toolbar option "Tools" and then go to "Internet Options". After the Internet Options window is available, you will want to click on the "Privacy" tab at the top of the window. You will notice while on the "Privacy" tab at the bottom will be a section on Pop-Up Blockers. If you "Block pop-ups" checkbox is checked, click on the "Settings" button to allow for exceptions. If using Mozilla Firefox, click the top toolbar options "Tools" and then go to "Options". After the "Options" window is available, you will want to click on the "Content" tab at the top of the window. If you "Block Popup Window" is checked, click the "Allowed Sites" button to the right to allow for exceptions.

You can now add the RI ATR application links to the "Allowed Sites" list which the pop-up blocker will ignore when trying to block pop-ups from the RI ATR application. You will want to add <https://kitservices3.kithost.net/riatr/> for the Live system. Once this site is added to your "Allowed Sites" list, the pop-up blocker should no longer prevent pages from loading and appearing while you are using the RI ATR application.

Print Icon

The RI ATR Application has the print icon for easier access to viewing reports, you may need to have Active X installed on your computer to utilize the icon. Active X is a free download that should allow you to use the print icon, click on this link to access the Active X site: http://www.download.com/windows/activex/1921-2206_4-0.html If you are unable to download Active X, contact your organization's IT department. Firefox does **not** official Support ActiveX. <http://support.mozilla.com/en-US/kb/ActiveX>






***Note:** These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer versions.

Application Navigating

The RI ATR Application is set up in such a fashion that moving from Left to Right on the menu is the best approach to using the application. Start at Assessment, filling in all the information for that area before moving on to the next section. Continuing in this manner will ensure that all of the sections of the application have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

Computer Keys

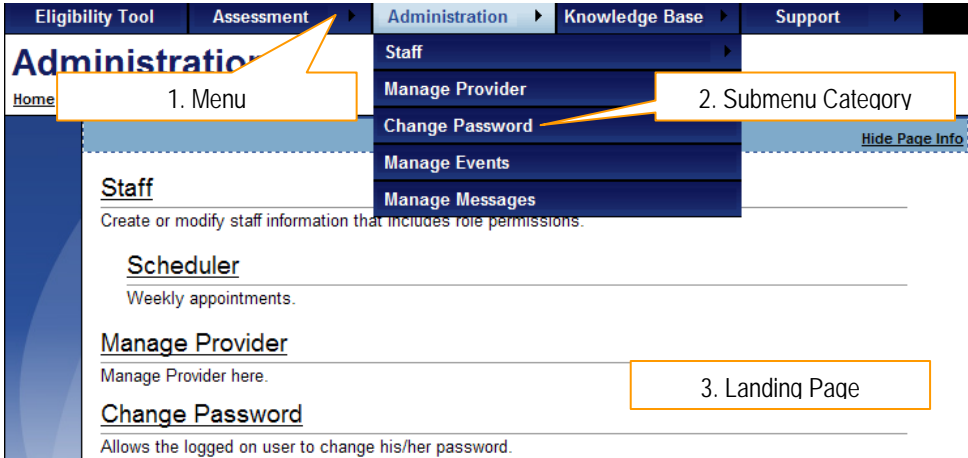
While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	The Cursor	Points to desired location
	The TAB key	Moves the cursor to the next data field
	Hold down the SHIFT key and then press the TAB key	Moves the cursor to the previous data field
	The Control (Ctrl) key	Enables blocked material to open (due to pop-up blocker)
	Use the MOUSE by pointing and clicking to move the cursor	Moves the cursor by pointing and clicking

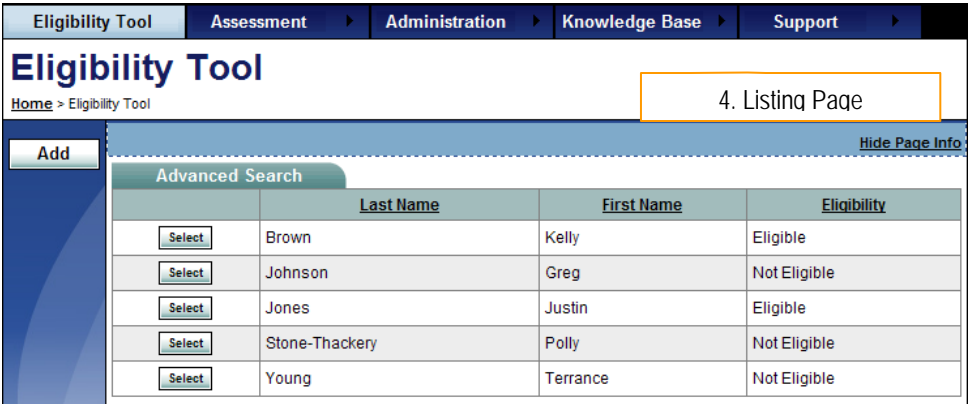
Menu Information

The Menu for the application is located across the top of the screen. Some Menu categories may be broken down into submenu categories to choose from. The Menu categories list the main modules that are within the application. When a Menu category is selected a list of submenu categories will be displayed on the Landing Page as links to access the modules. (For more information on Landing Pages, see the [Landing Page](#) section.)

- 1. Menu Constant (unchanging). Available at all times.
- 2. Submenu Category Varies depending on which Menu category is selected.
- 3. Landing Page Varies depending on which Menu category is selected.
- 4. Listing Page Varies depending on which submenu category is selected.



(This is a screenshot displaying the Menu (1), Submenu (2), and a Landing Page (3))



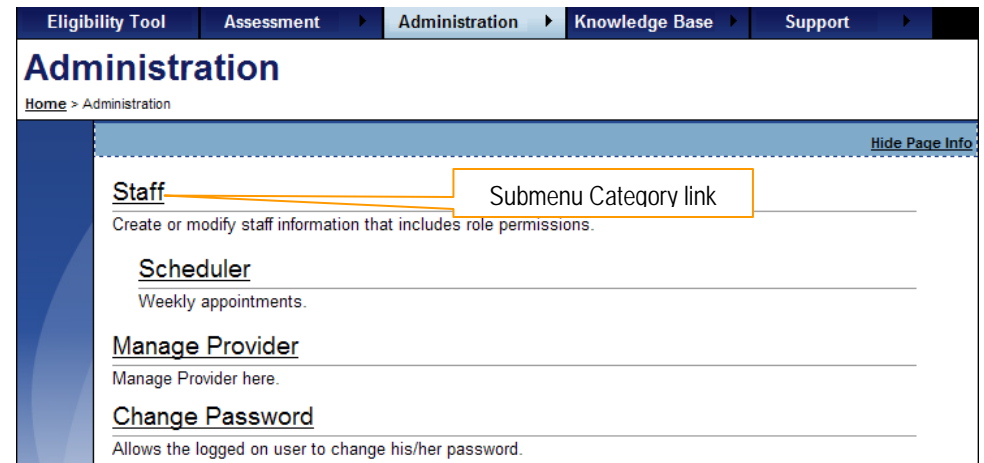
(This is a sample screenshot displaying a Listing Page (4))

Landing Page

When first entering a main module you will see a list of the entire submenu categories associated with that module. This is called a “Landing Page”. The Landing Page of each module provides a description of what can be done in that module as well as listing each submenu category as a link to the Listing Page and entry forms. (For more information on the Listing Pages, see the [Listing Page](#) section.) No data is entered on the Landing Page.

To open a category:

- Click on the Submenu Category Landing Page link.



(This is a partial screenshot displaying a Landing Page)

Tips

- [Hide Page Info](#) Allows the module description to be hidden from view
- [Show Page Info](#) Places the module description back in view

Listing Page

After selecting a category from the Landing Page you will see the “Listing Page”. When going into an area where a Listing Page is available, the service allows you to select previously entered data to edit or view its content. No data is entered on the Listing Page.

- When viewing a Listing Page, all of the data is available for Searching. (See the [Advanced Search](#) section for more details on searching.)

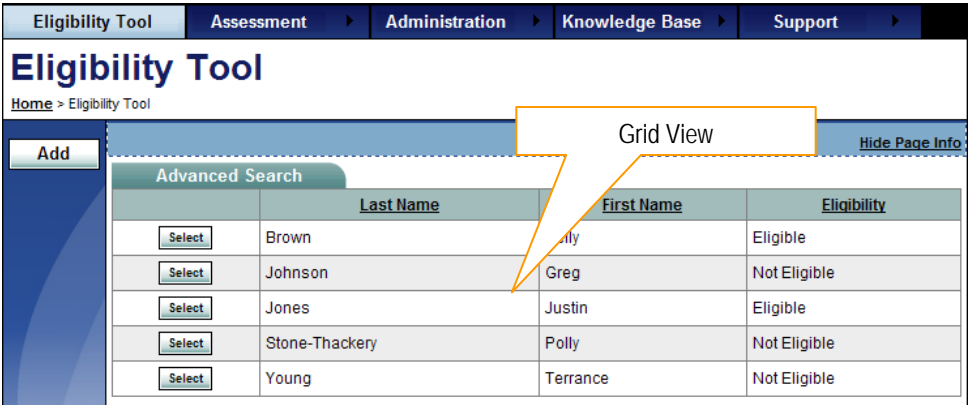
There are three types of Listing Pages:

1. **Grid View**
2. **Hierarchy View**
3. **Single Form View**

Grid View

The Grid View displays the data in tables. Specific pieces of data will be displayed within the Grid based on the fields within the entry/edit form.

1. When first viewing a Listing Page, all of the data is available for Searching. Click the **Select** button to the left of the data you would like to edit/view.
2. You will be taken to the entry/edit screen. This page will be in edit mode (all data fields will be open for data entry). Make any changes needed to the form. Click the **Save** button to save the changes.



The screenshot shows the 'Eligibility Tool' interface. At the top is a navigation bar with links: Eligibility Tool, Assessment, Administration, Knowledge Base, and Support. Below this is the 'Eligibility Tool' header with a breadcrumb 'Home > Eligibility Tool'. On the left is a sidebar with an 'Add' button. The main area is titled 'Grid View' and contains an 'Advanced Search' section. Below this is a table with columns: Last Name, First Name, and Eligibility. Each row has a 'Select' button to its left. The table contains five rows of data.

	Last Name	First Name	Eligibility
Select	Brown	Emily	Eligible
Select	Johnson	Greg	Not Eligible
Select	Jones	Justin	Eligible
Select	Stone-Thackery	Polly	Not Eligible
Select	Young	Terrance	Not Eligible

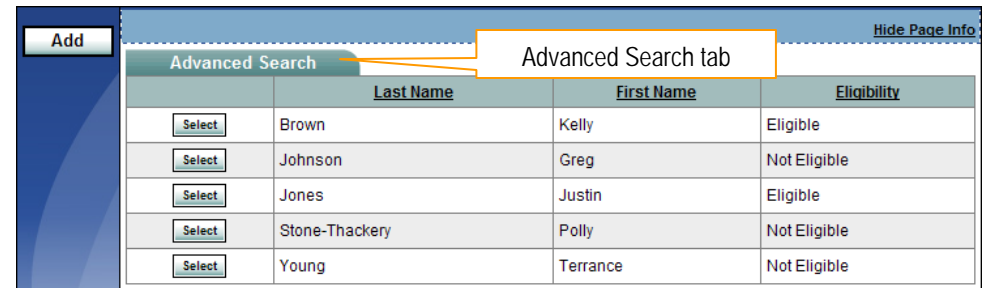
(This is a sample screenshot displaying a Listing Page)

Tips

- Clicking on the field name in a Category field (e.g., **First Name**) will allow you to sort through your files in ascending or descending order.
- The Page numbers (e.g. 1 2 3 4 5) beneath the grids allows to you move from page to page within the specific listing page. There is a maximum of 8 items in a grid, so once you exceed 8, the application automatically updates the grid to page 2. To get to a desired page click on the number and you will go to that specified page.

Advanced Search

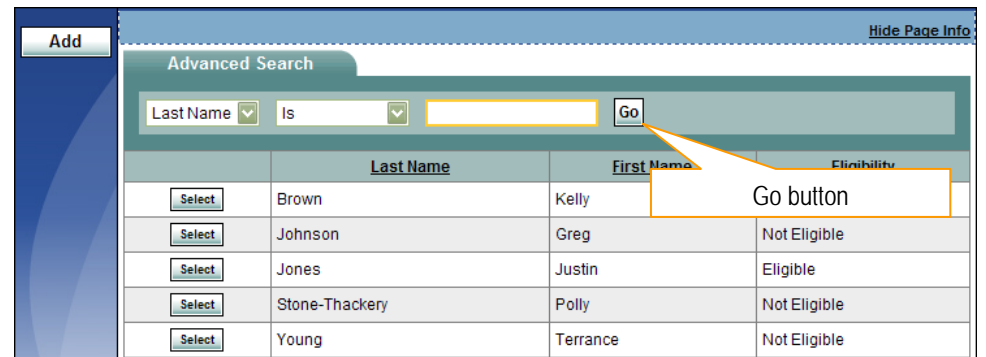
- To filter a search, click the **Advanced Search** (Advance Search) tab located at the top of the Grid.



Advanced Search			
	Last Name	First Name	Eligibility
Select	Brown	Kelly	Eligible
Select	Johnson	Greg	Not Eligible
Select	Jones	Justin	Eligible
Select	Stone-Thackery	Polly	Not Eligible
Select	Young	Terrance	Not Eligible

(This is a sample screenshot of a Data Grid displaying the Advanced Search tab.)

- The Advanced Search option allows you to limit search results. Select an option from the three search filter fields. Once the three search filter fields have been selected, click the **Go** (Go) button to see the search results.
- The three search filter fields are used in the following methods:
 - The first search filter will display the search categories to choose from.
 - The second search filter allows you to specify how you wish to search.
 - The third search filter is the search criteria. This field will change based on the second search filter selected.



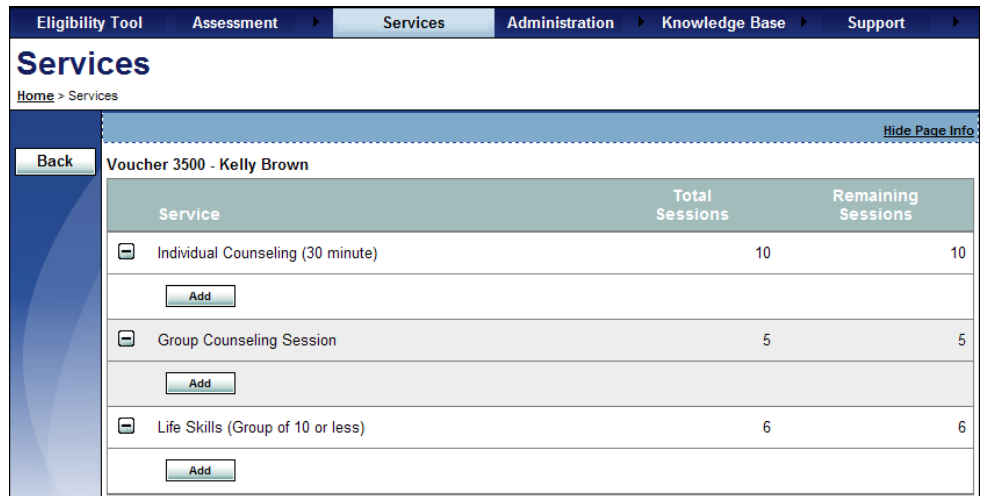
Advanced Search			
Last Name	Is		Go
	Last Name	First Name	Eligibility
Select	Brown	Kelly	Eligible
Select	Johnson	Greg	Not Eligible
Select	Jones	Justin	Eligible
Select	Stone-Thackery	Polly	Not Eligible
Select	Young	Terrance	Not Eligible

(This is a sample screenshot of Advanced Search displaying the search filter fields.)

Hierarchy View

A Hierarchical View is used when Adding/Editing within the Service Menu. Looking at the example, the service record is associated with the Treatment Service Type. The hierarchical view was designed to simplify these tasks.

- When first viewing the Listing Page, you will need to click the **+** (plus sign) to activate the hierarchy view. The + will become a **-** (minus sign) and all the data will display below the link
- To enter, edit or delete information within the link, click on the desired link.



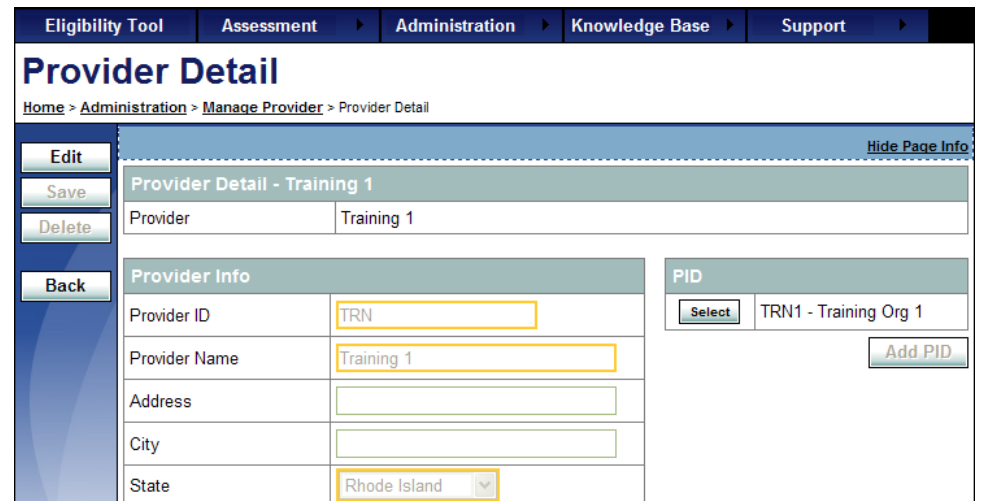
Service	Total Sessions	Remaining Sessions
Individual Counseling (30 minute)	10	10
Group Counseling Session	5	5
Life Skills (Group of 10 or less)	6	6

(This is a sample screenshot displaying a "Hierarchy View".)

Single Form View

The Single Form View is used when the data entered is updated periodically. Only one form is available and edited. The Single Form View displays the fields on the Edit Form.

- The form can be edited at any time, but you must click the **Save** (Save) button to update the data.



Provider Info	
Provider ID	TRN
Provider Name	Training 1
Address	
City	
State	Rhode Island

PID	
Select	TRN1 - Training Org 1

(This is a sample screenshot displaying a "Single Form View" Page.)

Edit Forms

The Edit Form contains the fields for entering and editing data. The buttons for saving, cancelling, deleting, printing, and in some cases, adding and editing, are available at the top right of the page. (See the [Data Fields & Buttons](#) section for additional details on the function of these buttons.)



- If you clicked the **Add** button to enter new information into a form, the Edit Form data fields will be blank.
- When selecting the **Select** button to view existing data, the Edit form data fields will display the data entered/selected previously. These fields may be modified, if needed.

The screenshot shows a web application interface for editing staff information. At the top is a navigation bar with links: Eligibility Tool, Assessment, Administration, Knowledge Base, and Support. Below this is a header section titled 'Staff' with a breadcrumb trail: Home > Administration > Staff. On the left side, there is a vertical menu with buttons: Cancel, Edit, Save, Delete, and Back. The main content area is titled 'General Information' and contains several form fields: Salutation (a dropdown menu), Last Name (a text input field), First Name (a text input field), Status (a dropdown menu), and Credentials (a text input field). In the top right corner of the form area, there is a link 'Hide Page Info' and a note '* Indicates Required Field'. A 'Permissions' button is also visible in the top right corner.

(This is a sample screenshot displaying a blank Edit Form.)

Data Fields and Buttons

In the RI ATR application there are several fields, boxes and buttons that are used to collect and store data.

Type	Preview/Description
Text Field (aka Text Box)	<input type="text"/> (fill in the blank)
Dropdown List (aka Pull Down Menu)	Please Select  (select one)
Radio Buttons	<input checked="" type="radio"/> Selected <input type="radio"/> Not Selected
Check Boxes	<input checked="" type="checkbox"/> Selected <input type="checkbox"/> Not Selected
First Name <input type="text"/>	A yellow field denotes a required field
Calendar	 (See the Calendar section for additional details.)

It does not matter the order in which the above fields are filled in, but if a required field is not filled in and you try to save the form, you will receive a message informing you what field is missing data and you will not be able to save the form until that field has data.

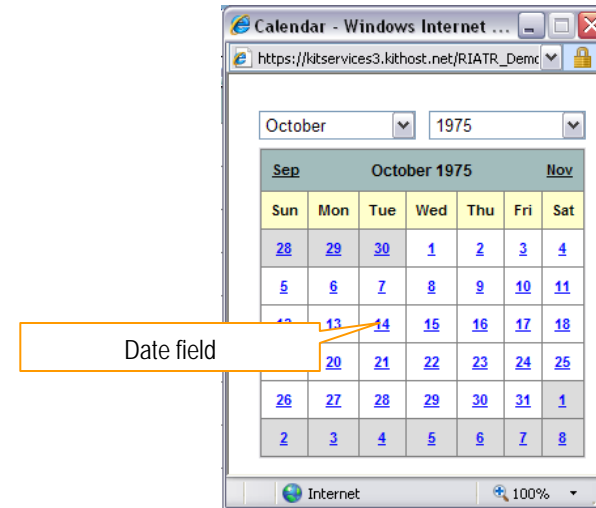
Tips

- All the fields within a yellow box are required fields. These must have a value entered before the record can be saved.
- You can type an identifying letter of an item in a dropdown list and the first selected beginning with that letter will appear in the box.

Calendar

Dates can be entered in two different ways: 1) typing the date directly into a date field or 2) using the 📅 (Calendar) icon. The 📅 (Calendar) icon can be used as an alternative option to entering a date directly into a date field.






1. Click the 📅 (Calendar) icon. A new window will open displaying a calendar.
2. To change the month, use the month links on the top corners of the calendar.
 - a. Click the left month link to go to the previous month.
 - b. Click the right month link to go to the upcoming month.
 - c. If the date is not within the months displayed, you can select the Month and Year by using the dropdown lists.
3. Once the correct month is displayed, select the date by clicking on a number within the calendar.



(This is a screenshot displaying the calendar feature.)







Edit Form Buttons

Information is entered and edited on the computer screen through data entry/edit forms. The table below summarizes the buttons used to enter/edit information located to the left of each form. This is referred to as the “left toolbar”.




	Must be pressed first to add new information to a form
	Must be pressed to modify existing information
	Adds the information on a form to the RI ATR database
	Removes the information currently on a form from the RI ATR database
	Cancels the Add or Edit without saving any information entered

Additional Buttons

Below are some additional buttons that may appear within a form.

	Returns you to the Listing Page
	Forwards the approved information to the appropriate parties for further consideration.
	Downloads the selected file into the desired format.
	Opens the information in the enter/edit form for viewing or modifications
	Changes the text size by clicking on one of the different sized  s (For more information, see the Using the Text Resizer section)

Using the Text Resizer

You can alter the size of the text on a form by using the Text Resizer . Clicking on one of the s changes the text size from smallest to largest. Place the mouse pointer over one of the s and left click to change the size.



Provides the smallest text size



Provides the default text size



Provides a medium text size



Provides the largest text size

LOGIN PROCEDURE

Connect to the Internet using an Internet browser. In the Address field, type in the following address and press Enter on your keyboard:

Live Data: <https://kitservices3.kithost.net/riatr/>

1. Type the login name provided by your acting administrator in the **User ID*** field.
2. Type the password in the **Password*** field.
3. Click the **Log In** (Login) button.

State of Rhode Island
Rhode Island ATR3

Login to get started!

This is the RI-ATR3 Demo version.
[Click here to go to the Live version.](#)

User ID:

Password:

Log In

Forgot User ID? [Click Here](#)

Forgot Password? [Click Here](#)

Service Announcement

Customer Support Unavailable
Holiday
on: **Friday 12/31/2010**

Server Maintenance
Normal Maintenance
on: **Sunday 1/16/2011 10PM to 4AM EST**

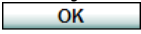
Server Maintenance
Normal Maintenance
on: **Sunday 2/13/2011 10PM to 4AM EST**

Server Maintenance
Normal Maintenance
on: **Sunday 3/13/2011 10PM to 4AM EST**

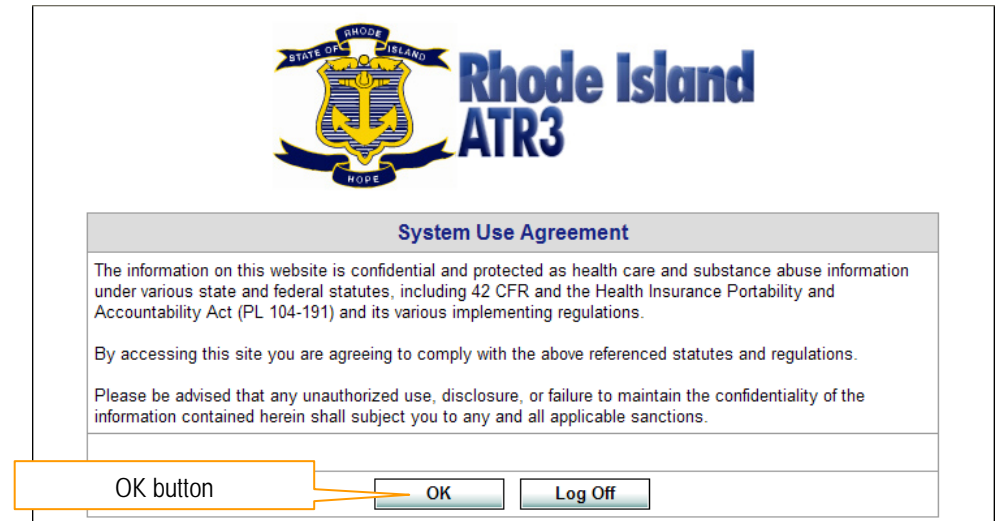
(This is a screenshot of the Login page)

Tips

- The **User ID*** IS NOT case sensitive.
- The **Password*** IS case sensitive.

4. To enter, you must read and agree to the System Use Agreement by clicking the  (Ok) button.

*Note: If you do not wish to log in, click the  (Log Off) button.

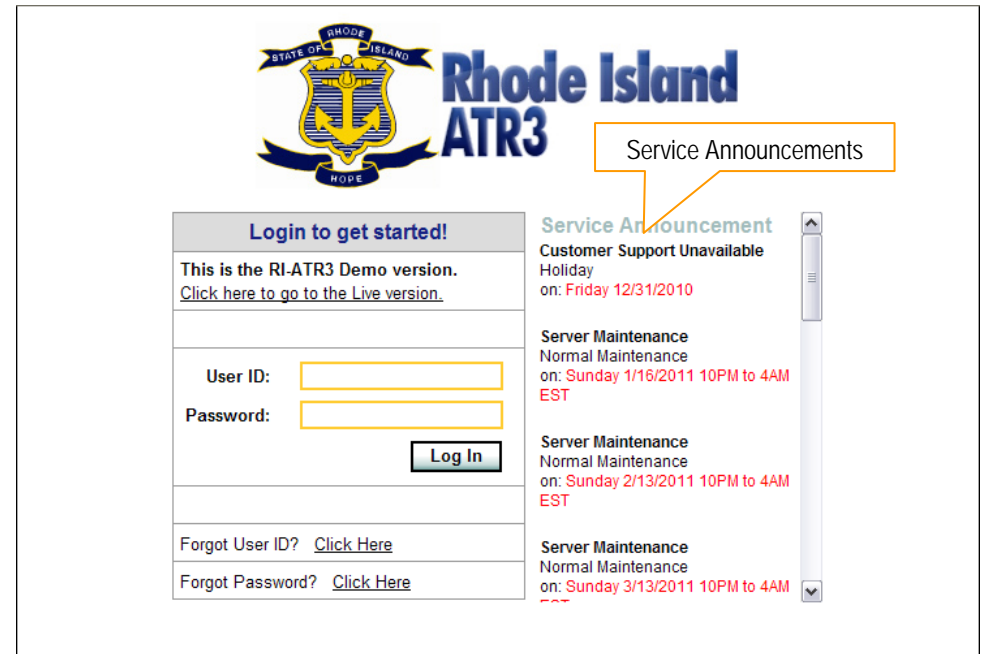


(This is a screenshot of the System Use Agreement Screen)

Service Announcements

The Service Announcements that are located on the Login Page are there to notify users that the Service is receiving any necessary server updates. The Service may be down for a short period of time which means you will not be able to log into the Service or save any data at that time.

Service Maintenance typically occurs once a month.



(This is a screenshot of the Login page)

Forgot User ID?

If you are unable to log into the RI ATR application due to forgetting your User ID, you can retrieve this information by clicking the link (entitled Click Here) next to Forgot User ID?

Login to get started!

This is the RI-ATR3 Demo version.
[Click here to go to the Live version.](#)

User ID:

Password:

Log In

Forgot User ID? [Click Here](#)

Forgot Password? [Click Here](#)

Service Announcement

Customer Support Unavailable
Holiday
on: Friday 12/31/2010

Server Maintenance
Normal Maintenance
on: Sunday 1/16/2011 10PM to 4AM EST

Server Maintenance
Normal Maintenance
on: Sunday 2/13/2011 10PM to 4AM EST

Server Maintenance
Normal Maintenance
on: Sunday 3/13/2011 10PM to 4AM EST

Forgot User ID? link

(This is a screenshot of the Login page)

1. Enter the email address associated with your account in the **E-mail Address** field.
2. Click the **OK** (OK) button.

You will receive a message that User ID information was sent to the email address specified. An email will then be sent supplying you with the User IDs associated with the specified email address.

User ID Recovery

Enter your E-mail address

E-mail Address:

OK button

OK **Cancel**

(This is a screenshot of the User ID Recovery screen)

Forgot Password?

If you are unable to log into the RI ATR application due to forgetting your Password, you can retrieve this information by clicking the link (entitled [Click Here](#)) next to Forgot Password?

Rhode Island ATR3

Login to get started!

This is the RI-ATR3 Demo version.
[Click here to go to the Live version.](#)

User ID:

Password:

Log In

Forgot User ID? [Click Here](#)

Forgot Password? [Click Here](#)

Service Announcement

Customer Support Unavailable
Holiday
on: **Friday 12/31/2010**

Server Maintenance
Normal Maintenance
on: **Sunday 1/16/2011 10PM to 4AM EST**

Server Maintenance
Normal Maintenance
on: **Sunday 2/13/2011 10PM to 4AM EST**

Server Maintenance
Normal Maintenance
on: **Sunday 3/13/2011 10PM to 4AM EST**

Forgot Password? link

(This is a screenshot of the Login page)

3. Type the login name provided by your acting administrator in the **User ID*** field.
4. Click the (OK) button.

Rhode Island ATR3

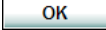
Password Recovery

Step 1: Enter your User ID

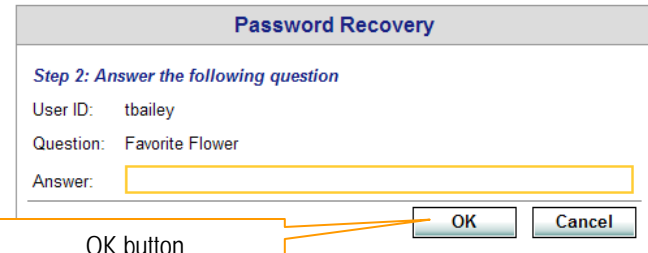
User ID:

OK button

(This is a screenshot of the Password Recovery Screen)

5. Enter the answer to the password question you specified when your account was activated in the **Answer:** field.
6. Click the  (OK) button.

You will receive a message that your password has been reset. An email will be sent to the email associated with the User ID with a link to reset the password. See Account Activation for details on resetting your password.

A screenshot of a web-based "Password Recovery" form. The title "Password Recovery" is at the top in blue. Below it, the text "Step 2: Answer the following question" is in blue. The form displays "User ID: tbailey" and "Question: Favorite Flower". There is a text input field for the "Answer:" with a yellow border. At the bottom right are "OK" and "Cancel" buttons. An orange callout box points to the "OK" button with the text "OK button".

(This is a screenshot of the Password Recovery Screen)

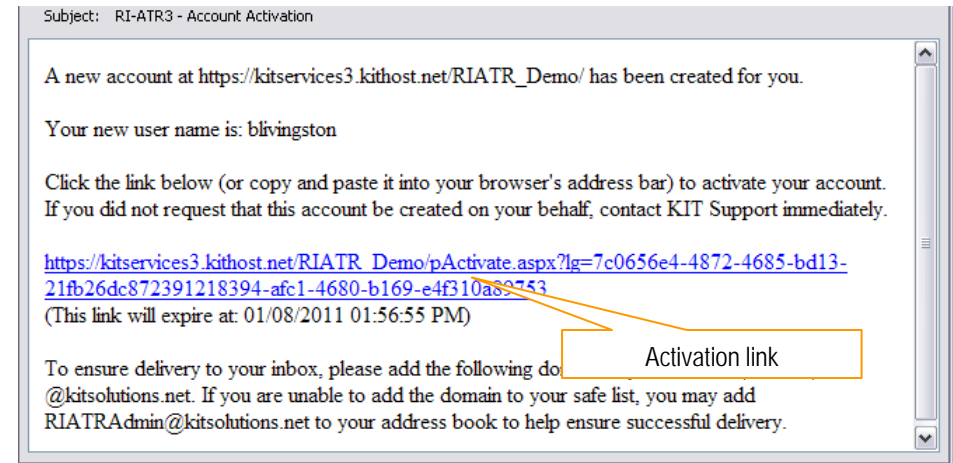
Tips

- If you have not activated your account, you will not be able to use the Forgot Password feature.
- Password Answers are case-sensitive.

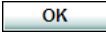
Account Activation

Your login information is created for you by your system administrator (IT Manager). In order to log into RI ATR for the first time you will need to activate your account first.

1. Once you have been informed by your system administrator that an account was created for you, check your email's inbox. You should receive an email with instructions for activation.
2. Click the activation link within the email to activate your account.



(This is a sample screenshot of the activation email)

3. Enter your password into the **Password** field. It must contain the following:
 - a. Minimum 8 characters in length
 - b. Must have 1 upper case character
 - c. Must have 1 number
 - d. Cannot use User ID as part of password
4. Retype the password in the **Confirm Password** field.
5. Enter your password question into the **Password Question** field.
6. Enter your password answer into the **Password Answer** field.
7. Click the  (OK) button. You will now be taken to the Login Page.
**Note: You will receive a confirmation email that your account has been activated.*

(This is a screenshot of the Account Activation Screen)


Tips

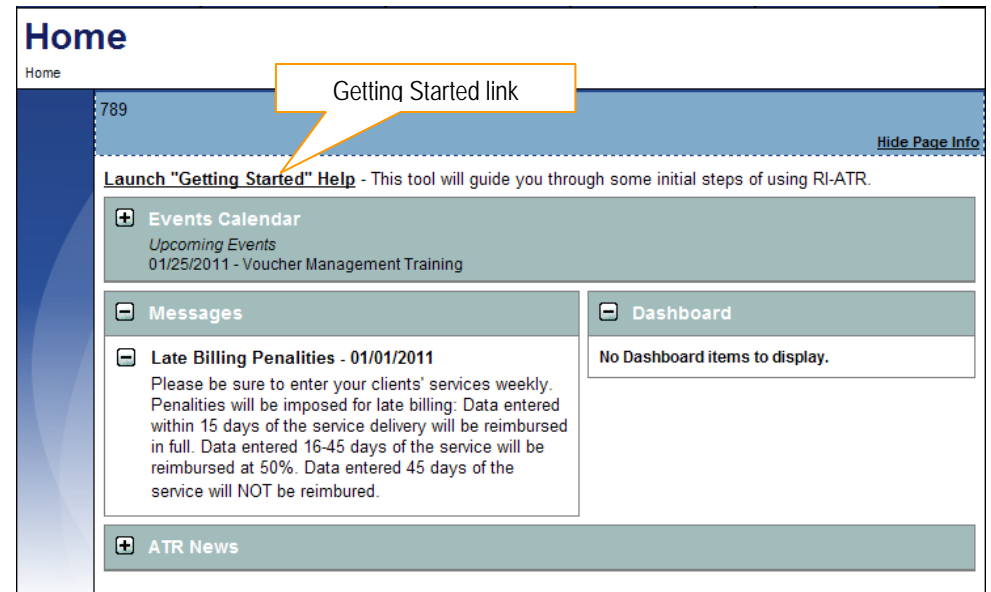
- The activation link is only available for 72 hours. If you did not click the link in time, contact your system administrator to reset your password.
- If you used the Forgot Password feature, the Password Question and Password Answer will already be filled in for you based on your activation. You may change this information if desired.

HOME

The Home Page provides the organization with important messages, upcoming events and links to News regarding treatment.



Getting Started

- To view a guide through the initial steps of using the RI-ATR application, click on the **Launch “Getting Started” Help** link.
- A new window will open displaying some basic information about the RI ATR application.
- To close the window, click on the  (X) in the upper right hand corner.



(This is a sample screenshot displaying the Home page)

Events Calendar

- To view the events calendar, click on the  (plus sign) next to the Events Calendar.
- The Calendar will expand.
- To view Event details for a particular day, click on the calendar date (e.g., [25](#)).
- Switch to the previous or next month by selecting the link located to the right or left of the current month's name.
- To close the calendar, click on the  (minus sign).

*Note: To add events to the calendar, see the Manage Events section.

Launch "Getting Started" Help - This tool will guide you through some initial steps of using RI-ATR.

Events Calendar

Event Date: 01/25/2011
 Title: Voucher Management Training
 Description: This is a training on the voucher management system. We will cover the VMS, GPPA and overview of ATR.
 URL:
 Created By: Provider

Link to the next month

Dec	January 2011						Feb
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
26	27	28	29	30	31	1	
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	
16	17	18	19	20	21	22	
23	24	25 ■ Voucher Management Training	26			29	
30	31	1	2	3	4	5	

Upcoming Event

Event Key: ■ = State ■ = Provider

(This is a sample screenshot displaying the Events Calendar)

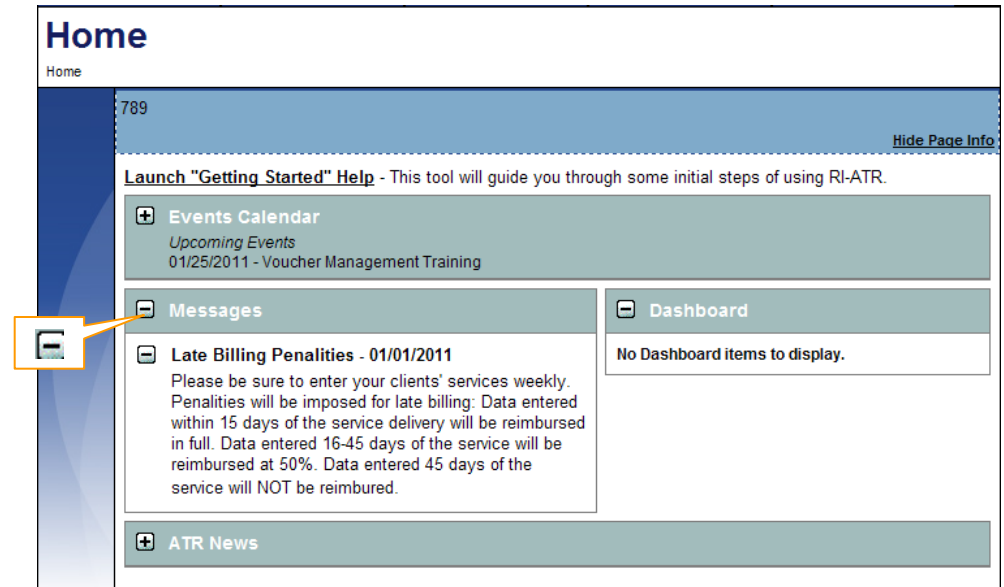
Tips

- If an event is added by the state, then the event will display for all providers, regardless of their permission level.

Messages

- To view a Message description, click on the **+** (plus sign) next to the message title. The **+** (plus sign) will become a **-** (minus sign). To close the description, click on the **-** (minus sign).

*Note: To add messages to the Home page, see the Manage Messages section.

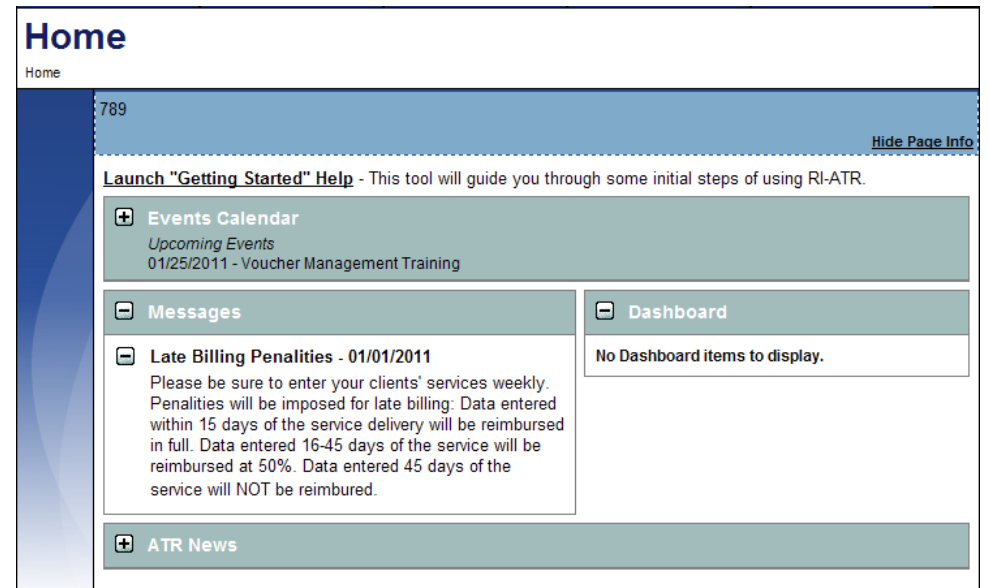


(This is a sample screenshot of the Home Page displaying an open message.)

Dashboard

The Dashboard feature on the home page is designed to provide status updates in regards to various timeliness, notifications and inactivity scenarios for reports and surveys within the ATR Application.

- To view a list of dashboard reports, click on the **+** (plus sign) next to the Dashboard. The **+** (plus sign) will become a **-** (minus sign). To close the list of reports, click on the **-** (minus sign).



(This is a sample screenshot of the Home page displaying the Dashboard.)

Voucher Timeliness

This report shows all vouchers with no services within 20 days of being issued

1. Green=0-19 days
2. Yellow=20-30 days
3. Red=30+ days

GPRA Follow-Up Notification

This report shows all vouchers that are 4.5 months (135 days) past voucher issue.

1. Green=0-134 days
2. Yellow=135-180 days
3. Red=181+ days

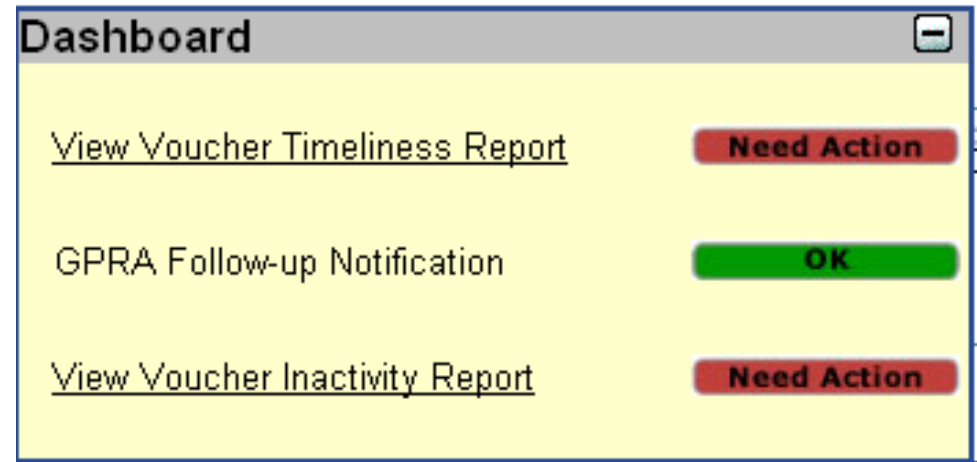
Voucher Inactivity

This report shows all vouchers that have no services for at least 20 days.

1. Green=0-19 days
2. Yellow=20-30 days
3. Red=30+ days

Tips

- Green – No Action Needed
- Yellow – Alert. A link is available for the report or survey that falls within this status.
- Red – Action. A link is available for the report or survey that falls within this status.



(This is a sample screenshot of the Dashboard notifications on the Home Page.)

ATR News

- To view a list of News articles, click on the **+** (plus sign) next to the ATR News. The **+** (plus sign) will become a **-** (minus sign). To close the list of articles, click on the **-** (minus sign).
- To view a News article, click on the title of the article from the **ATR News** section. ATR News section is automatically updated in 'real-time' by JoinTogether.
- A new window will open when you click on the specified news article link.
- To close the window, click on the **X** (X) in the upper right hand corner or click the **Close** (Close) link.



(This is a sample screenshot of the Home page displaying the ATR News links)

Tips

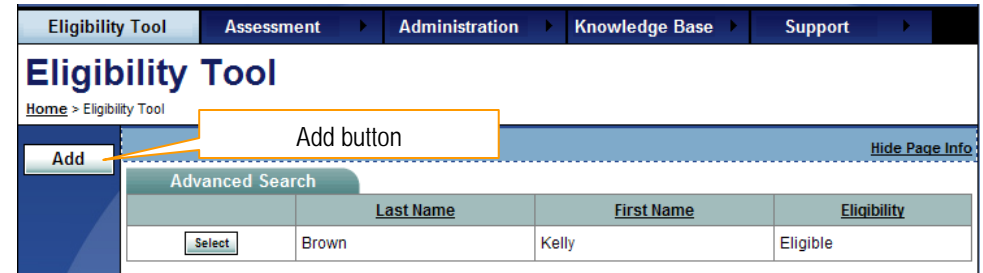
- If no news articles appear when click the **+** (plus sign), click the link located at the bottom of the page to enable the news feed.
You are NOT viewing the news feed which results in better page performance. Click [here](#) to re-enable the news feed.

ELIGIBILITY TOOL

The Eligibility Tool module is designed to create a client profile and determine their eligibility for treatment.

Adding a Client

1. Click **Eligibility Tool** from the Menu.
2. Click the **Add** (Add) button.



(This is a sample screenshot of the Eligibility Tool Listing Page.)

3. Enter the client's first name in the **First Name** field.
4. Enter the client's last name in the **Last Name** field.
5. Enter the client's telephone number in the **Phone** fields.
*Note: The Phone must be filled out in three fields. The fourth field is optional for an extension number.
6. Enter the client's emergency telephone number in the **Emergency Phone** field.
*Note: The Emergency Phone must be filled out in three fields. The fourth field is optional for an extension number.
7. Enter the client's email address in the **Client E-mail** field.
8. Enter the client's address in the **Address** field.
9. Enter the client's city in the **City** field.
10. The **State** field is defaulted to RI.
11. Enter the client's 5 digit zip code in the **Zip Code** fields.
12. Enter the client's social security number in the **Social Security Number** field.
13. Enter the client's date of birth in the **Birth Date*** field as mm/dd/yyyy or select the date by clicking on the calendar . (See [Calendar](#) section for further details)
14. Click the **Save** (Save) button from the left toolbar.
*Note: To exit the screen without saving any details, click the **Cancel** (Cancel) button.
15. Click the **Back** (Back) button to return to the Listing page.

* Indicates Required Field

Eligibility Screening

General Information

First Name

Last Name

Client Phone () - x

Emergency Phone () - x

Client E-mail

Mailing Address

City

State RI

Zip Code

Social Security Number - -

Birth Date (mm/dd/yyyy)

(This is a sample screenshot of the Eligibility Tool edit form.)

Editing a Client

1. Click **Assessment** from the Menu.
2. Select the client you wish to edit by clicking the **Select** (Select) button to the left of the client's name.

Eligibility Tool

Home > Eligibility Tool

Add

Advanced Search

	Last Name	First Name	Eligibility
Select	Brown	Kelly	Eligible
Select	Johnson	Greg	Not Eligible
Select	Jones		Eligible
Select	Stone-Thackery	Polly	Not Eligible
Select	Young	Terrance	Not Eligible

(This is a sample screenshot of the Eligibility Tool Listing Page.)

3. Click the **Edit** (Edit) button from the left toolbar.
4. The client will appear in the edit mode.
5. Make any changes needed to the details.
6. Click the **Save** (Save) button from the left toolbar.
- *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
7. Click the **Back** (Back) button to return to the Listing page.

Eligibility Tool

Home > Eligibility Tool

Cancel Save Delete Back

Save button

* Indicates Required Field

Eligibility Screening

General Information

First Name Kelly

Last Name Brown

Client Phone (401) 555 - 3625 x

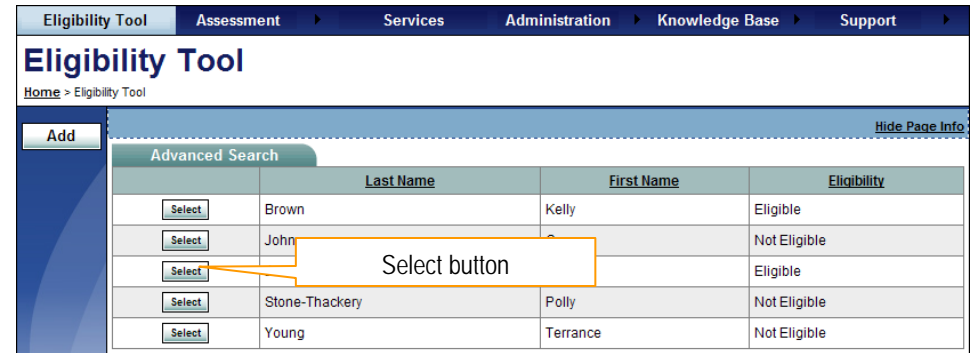
Emergency Phone (401) 555 - 3625 x

Client E-mail

(This is a sample screenshot of the Eligibility Tool edit form.)

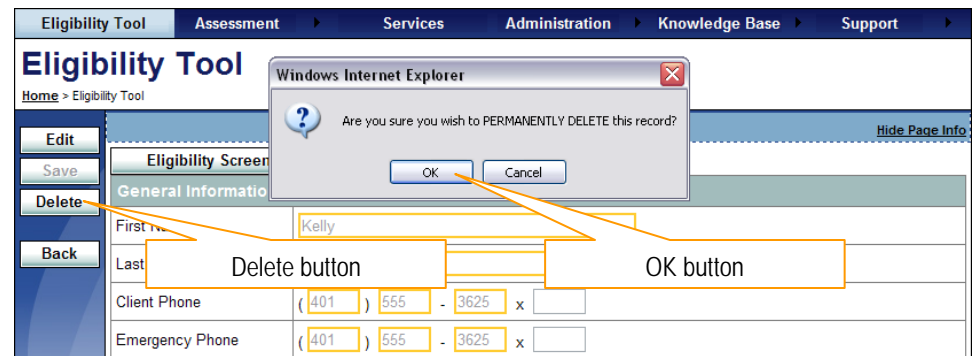
Deleting a Client

1. Click **Assessment** from the Menu.
2. Select the client you wish to delete by clicking the **Select** (Select) button to the left of the client's name.



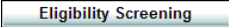
(This is a sample screenshot of the Eligibility Tool Listing Page.)


3. Click the **Delete** (Delete) button from the left toolbar.
4. You will receive a message asking if you are sure. Click the **OK** (OK) button to continue deleting the client.
*Note: To cancel the deletion, click the **Cancel** (Cancel) button.
5. Click the **Back** (Back) button to return to the Listing page.

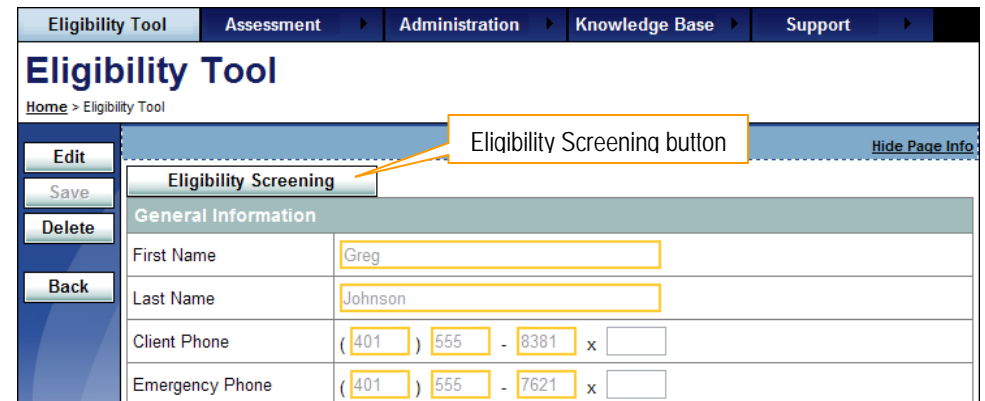


(This is a sample screenshot of the Eligibility Tool edit form.)



Eligibility Screening

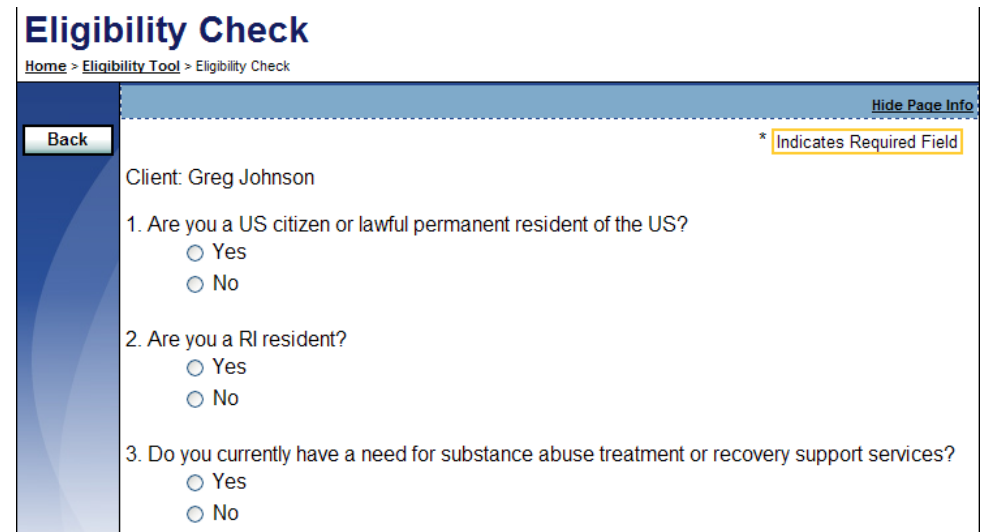
Once a client profile has been saved, the  (**Eligibility Screening**) button will become available to check the client's eligibility for treatment.

1. From the Eligibility Tool Edit form, click the  (**Eligibility Screening**) button.



(This is a sample screenshot of the Eligibility Tool Edit Form.)

2. Answer each of the questions that appear.
3. Click the  (**Check Eligibility**) button at the bottom of the page.
4. Click the  (**Back**) button to return to the Eligibility Tool edit form.



(Partial screenshot of the Eligibility Check Edit Form.)

Tips

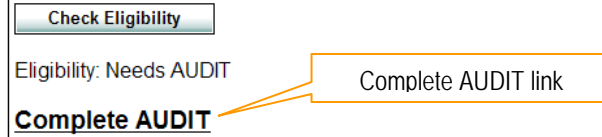
- The client will be considered eligible for treatment based on his/her US citizenry, RI residency, and monthly income based on family size.

Complete AUDIT

If a client is deemed eligible for treatment, the AUDIT will need completed.

1. From the Eligibility Check Edit form, click the **Complete AUDIT** link.
2. From the Eligibility Check Edit form, click the **Complete AUDIT** link.
3. Answer each of the questions that appear.
4. Click the **Next** (Next) button to go to the next page of questions or click the **Back** (Back) button to return to the previous page.
5. Click the **Done** (Done) button when you've completed the questions.
*Note: To exit the screen without saving any details, click the **Cancel** (Cancel) button.

*Note: The **Progress Bar** at the top of each page shows how much of the survey has been completed.

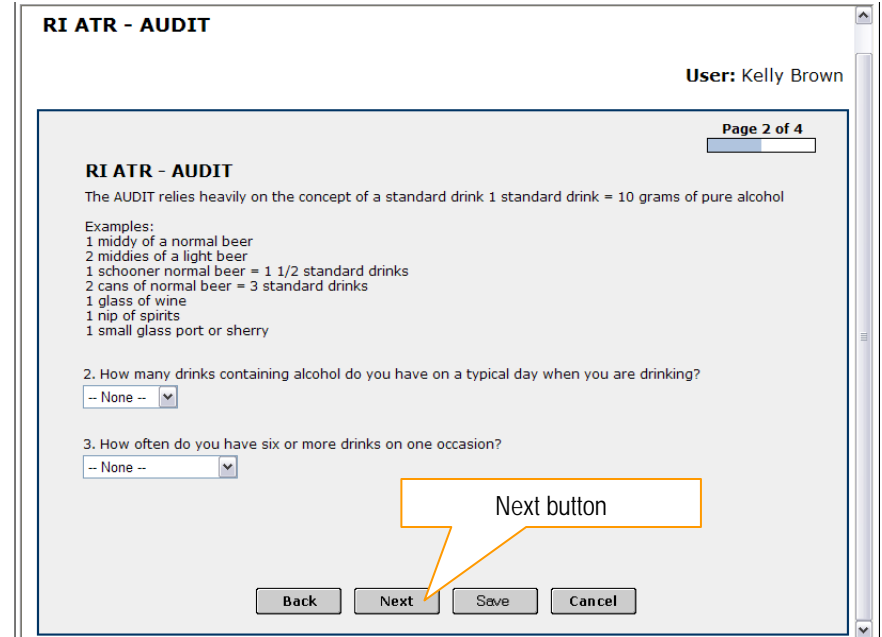


Check Eligibility

Eligibility: Needs AUDIT

Complete AUDIT

(This is a sample screenshot of the Eligibility Check Edit Form.)



RI ATR - AUDIT

User: Kelly Brown

Page 2 of 4

RI ATR - AUDIT

The AUDIT relies heavily on the concept of a standard drink 1 standard drink = 10 grams of pure alcohol

Examples:
1 middy of a normal beer
2 middies of a light beer
1 schooner normal beer = 1 1/2 standard drinks
2 cans of normal beer = 3 standard drinks
1 glass of wine
1 nip of spirits
1 small glass port or sherry

2. How many drinks containing alcohol do you have on a typical day when you are drinking?
-- None --

3. How often do you have six or more drinks on one occasion?
-- None --

Back Next Save Cancel

(This is a sample screenshot of the AUDIT Edit Form.)

Tips

- You can click the **Save** (Save) button at anytime. If you have not completed the entire AUDIT, when you return it will start on the next page that needs completed.
- Clicking the **Save** (Save) button on a page will also act as the **Next** (Next) button.

6. Once you have completed the AUDIT and clicked the **Done** (Done) button, you will be taken to the Individual Responses page to view the results. Click the **Done** (Done) button when you are finished.
7. Click the **Back** (Back) button to return to the Eligibility Tool edit form.

QuizBuilder

Individual Responses

RI ATR - AUDIT

Quiz Details

Started: 1/8/2011 1:49:31 PM **Completed:** 1/8/2011 1:52:16

Time Spent: 02 Minutes, 45 Seconds

Score: 21 points

Page Summary	Percentage Awarded	Points Available	Points
AUDIT:	100%	2	2

1. 9. Have you or someone else been injured because of your drinking?

a. No

b. **Yes, but not in the last year (2 points)**

c. Yes, during the last year (0 points)

2. 10. Has a relative, friend, doctor, or other health care worker been concerned about your drinking down?

a. No

Done

Done button

(This is a sample screenshot of the AUDIT Edit Form.)


ASSESSMENT

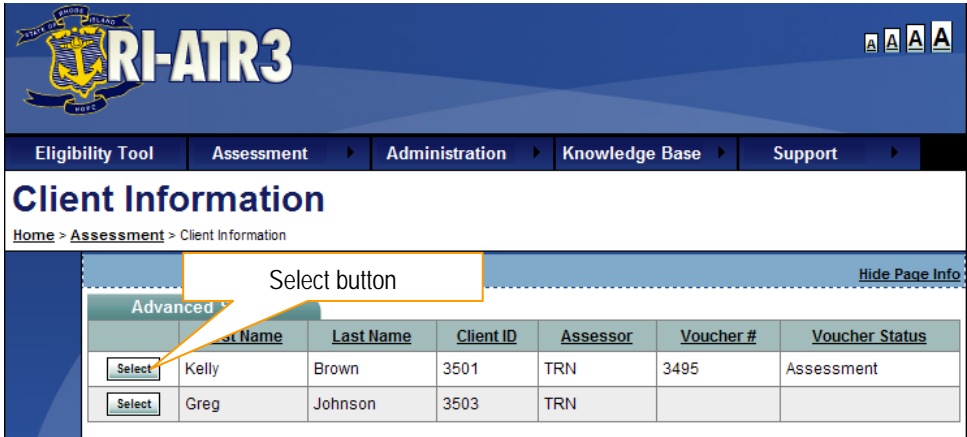
The Assessment module is designed to register and track client information within the application.

Client Information

Use the Client Information form to add/edit and delete information for clients within the application

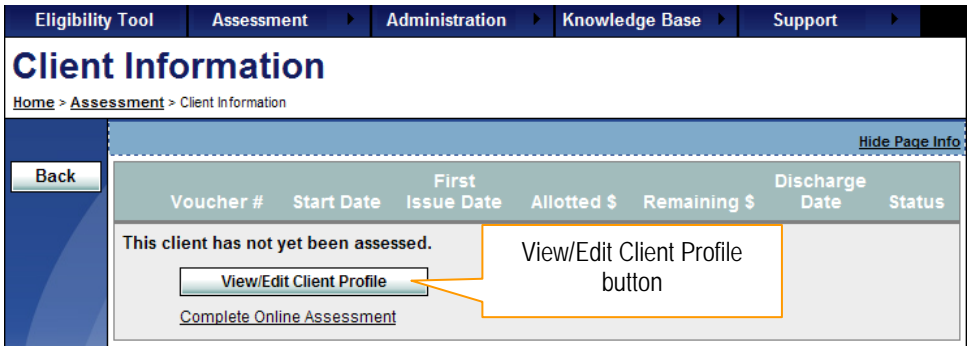
Updating Client Information

- 1. Click **Assessment** from the Menu.
- 2. Click **Client Information** from the Assessment Landing Page.
- 3. Click the  (Select) button to the left of the appropriate client.





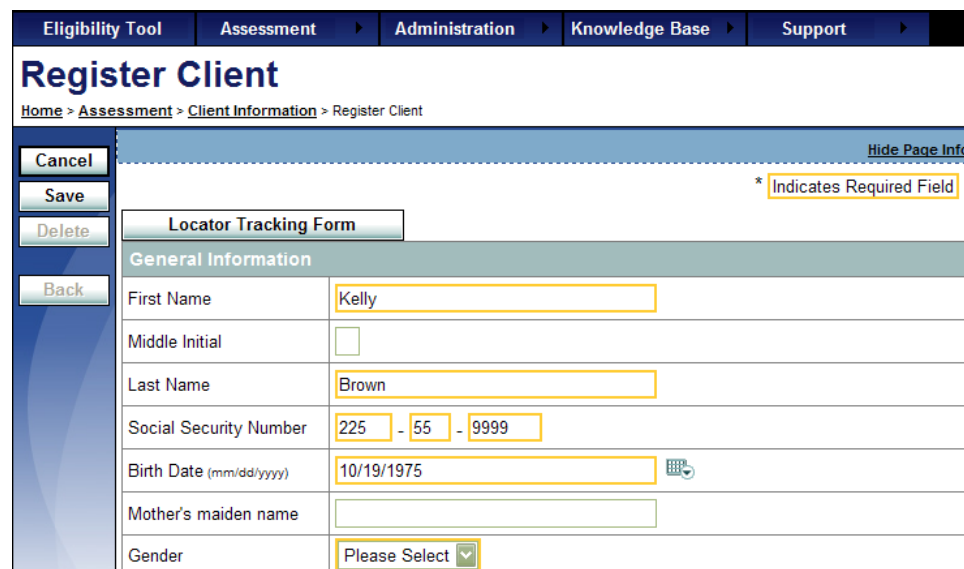
(This is a sample screenshot of the Client Information Listing Page.)

- 4. Click the  (View/Edit Client Profile) button.



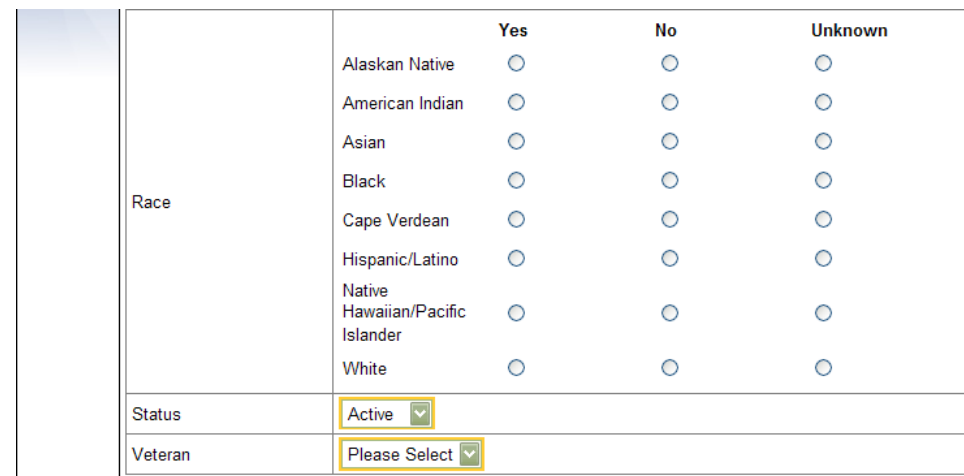
(This is a sample screenshot of the Voucher Information Listing Page.)

5. Click the  (**Edit**) button from the left toolbar.
6. Some fields will be filled in for you based on the client profile entered in the Eligibility Tool.
7. Update the client's **General Information**.
 - a. Enter the client's first name in the **First Name*** field.
 - b. If desired, enter the client's middle initial in the **Middle Initial** field.
 - c. Enter the client's last name in the **Last Name*** field.
 - d. Enter the client's social security number in the **Social Security Number*** field.
 - e. Enter the client's date of birth in the **Birth Date*** field as mm/dd/yyyy or select the date by clicking on the calendar . (See [Calendar](#) section for further details)
 - f. If known, enter the client's Mother's maiden name in the **Mother's maiden name** field.
 - g. Select the client's **Gender*** using the dropdown list.





(This is a sample screenshot of the Register Client edit form.)

- h. Select the client's race using the **Race*** radio buttons.
- i. The **Status*** is defaulted to Active.
 - i. Active: the client is currently receiving treatment (can be viewed on other screens and reports).
 - ii. Inactive: the client is no longer receiving treatment (will no longer appear on other screens and reports).
- j. Select the client's veteran status from the **Veteran** dropdown list.



	Yes	No	Unknown
Alaskan Native	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
American Indian	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Asian	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Black	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cape Verdean	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hispanic/Latino	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Native Hawaiian/Pacific Islander	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
White	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Status: Active 

Veteran: Please Select 

(This is a screenshot of the Register Client edit form.)

8. Update the client's **Contact Information**.
- a. Enter the client's address in the **Address*** field.
 - b. Enter the client's city in the **City*** field.
 - c. The **State*** field is defaulted to RI.
 - d. Enter the client's 5 digit zip code in the **Zip Code*** fields.
Note: Enter the Zip Code extension in the second box for the Zip Code field, only the 5 digits are required.
 - e. Enter the clients area code and extension in the **Phone*** field.
 - f. If desired, enter and alternative phone number in the **Alt. Phone** fields.

Contact Information	
Address	758 Plaza Dr
City	Cranston
State	RI
Zip Code	02910
Phone	(401) 555 - 3625 x
Alt. Phone	() - x

(This is a sample screenshot of the Register Client Contact Information fields.)

9. Update the client's **Emergency Contact Information**.
- a. Enter the client's emergency contact name in the **Name*** field.
 - b. Enter the client's emergency area code and extension in the **Phone*** field.
10. Click the **Save** (**Save**) button from the left toolbar.
***Note:** To exit the screen without saving any details, click the **Cancel** (**Cancel**) button.
11. Click the **Back** (**Back**) button to return to the Listing page.

Emergency Contact Information	
Name	
Phone	(401) 555 - 3625 x

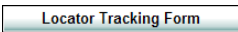
(This is a sample screenshot of the Register Client Emergency Contact information fields.)

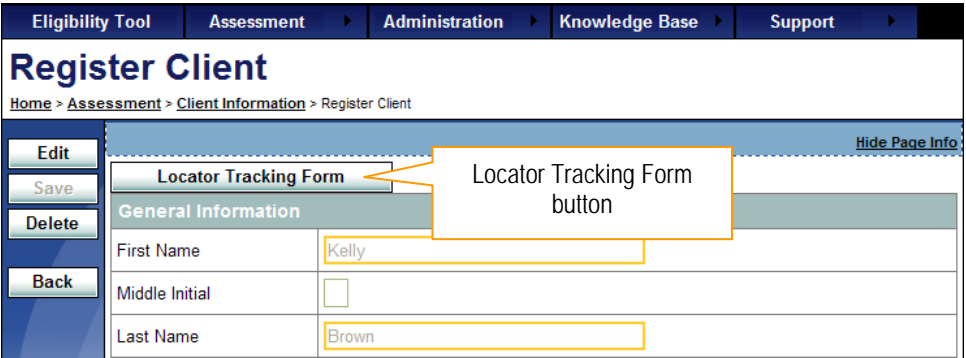
Tips

- Once the Client Information has been updated, the client will receive a voucher number.

Locator Tracking Form


The Locator Tracking Form is used to gather further information about a client. This form is not required, but highly suggested so the client can be found for their 6 month follow-up.

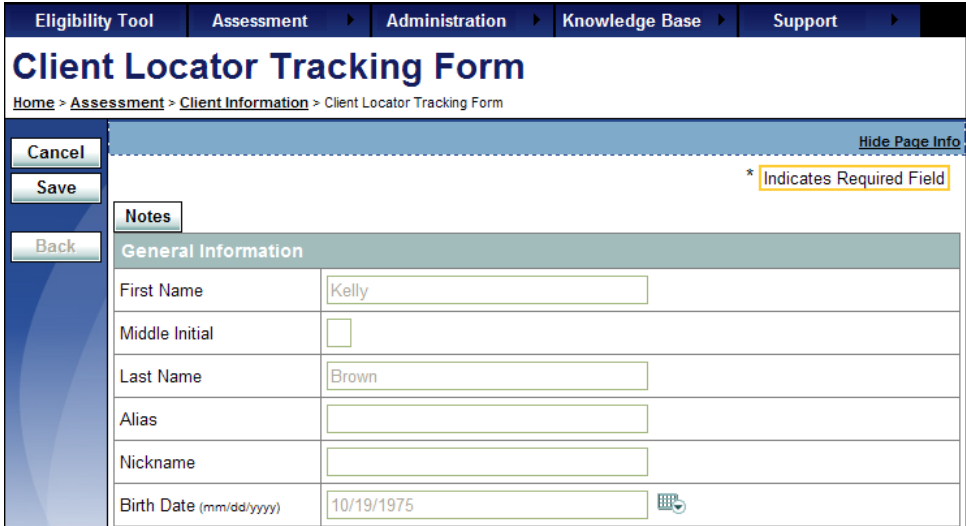
1. From the Register Client edit form, click the  (Locator Tracking Form) button.



The screenshot shows the 'Register Client' page with a navigation bar at the top containing 'Eligibility Tool', 'Assessment', 'Administration', 'Knowledge Base', and 'Support'. Below the navigation bar is the title 'Register Client' and a breadcrumb trail 'Home > Assessment > Client Information > Register Client'. On the left is a toolbar with 'Edit', 'Save', 'Delete', and 'Back' buttons. The main form area has a 'Locator Tracking Form' button highlighted with an orange box and a callout label 'Locator Tracking Form button'. Below this is a 'General Information' section with fields for 'First Name' (containing 'Kelly'), 'Middle Initial' (empty), and 'Last Name' (containing 'Brown').

(This is a sample screenshot of the Register Client edit Form)

2. Click the  (Edit) button from the left toolbar.
3. The required fields (i.e. **First Name**, **Last Name**, **Birth Date** and **Social Security Number**) are automatically filled in with the information that was entered in the Register Client screen.
4. Enter in additional information in the optional fields.



The screenshot shows the 'Client Locator Tracking Form' page with a navigation bar at the top containing 'Eligibility Tool', 'Assessment', 'Administration', 'Knowledge Base', and 'Support'. Below the navigation bar is the title 'Client Locator Tracking Form' and a breadcrumb trail 'Home > Assessment > Client Information > Client Locator Tracking Form'. On the left is a toolbar with 'Cancel', 'Save', and 'Back' buttons. The main form area has a 'Notes' tab and a 'General Information' section. The 'General Information' section contains fields for 'First Name' (containing 'Kelly'), 'Middle Initial' (empty), 'Last Name' (containing 'Brown'), 'Alias' (empty), 'Nickname' (empty), and 'Birth Date (mm/dd/yyyy)' (containing '10/19/1975'). A legend in the top right corner indicates that an asterisk (*) denotes a required field.

(This is a sample screenshot of the Locator Tracking Form)

5. The **Choose additional information to complete** dropdown list allows you to answer multiple different questions pertinent to the client.
- Select a question from the **Choose additional information to complete** dropdown list. New fields will appear.
 - Fill in the required fields and any optional fields you desire.
 - Click the **Add Row** (Add Row) button.

Choose additional information to complete	Where do you go when things are going well? ▼
Where do you go when things are going well?	
Name	<input type="text"/>
Street	<input type="text"/>
City	<input type="text"/>
State	Please Select ▼
Zip Code	<input type="text"/>
Phone	(<input type="text"/>) <input type="text"/> - <input type="text"/> x <input type="text"/>
E-mail	<input type="text"/>
Add Row	Add Row button

(This is a sample screenshot of the Locator Tracking Form.)

- d. A grid will appear displaying the question and answers. To delete the record, click the **Delete** link.
 - e. Repeat steps a-c for each question you wish to add for the client.
6. Click the **Save** (Save) button from the left toolbar.
 *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
 7. Click the **Back** (Back) button to return to the Register Client edit form.

Choose additional information to complete Please Select

Where do you go when things are going well?

	Relationship	Name	Street	City	State	Zip	Phone	E-mail
Delete		Bob's Bowling Alley					4015559122	

Delete link

(This is a sample screenshot of the Locator Tracking Form.)

Tips

- All required fields are defaulted from the Register Client Page.

Tracking Form Notes

1. Click the **Notes** (Notes) button from the top of the Client Locator Tracking Form Edit form.
2. Click the **Add** (Add) button.
3. Enter the **Date*** as mm/dd/yyyy or select the date by clicking on the calendar icon. (See [Calendar](#) section for further details)
4. Enter notes into the **Effort Made** field.
5. Enter notes into the **Outcome** field.
8. Click the **Save** (Save) button from the left toolbar.
 *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
6. To remove a record, click the **Delete** (Delete) button.
7. Click the **Back** (Back) button to return to the Locator Tracking form edit form.

Eligibility Tool | Assessment | Administration | Knowledge Base | Support

Client Notes

Home > Assessment > Client Information > Client Notes

Hide Page Info

Back

Add Note

Date (mm/dd/yyyy)

Effort made (phone call/letter sent)

Outcome

Save **Cancel**

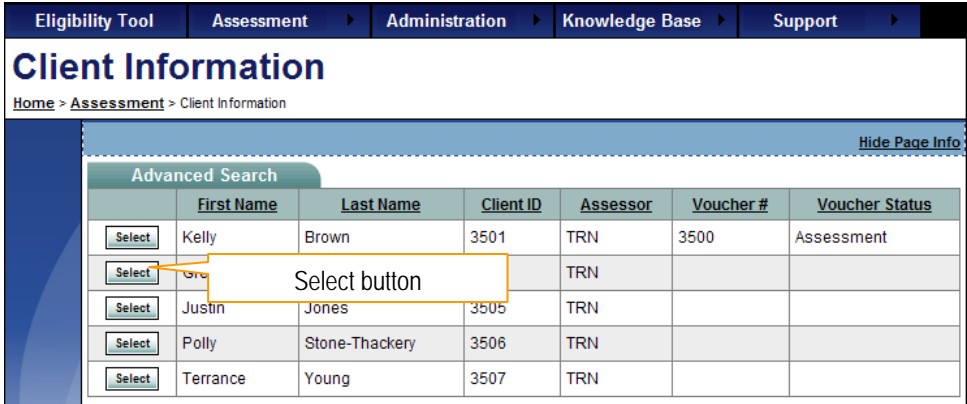
Save button

(This is a sample screenshot of the Client Locator Tracking Form Notes page.)

Voucher Information

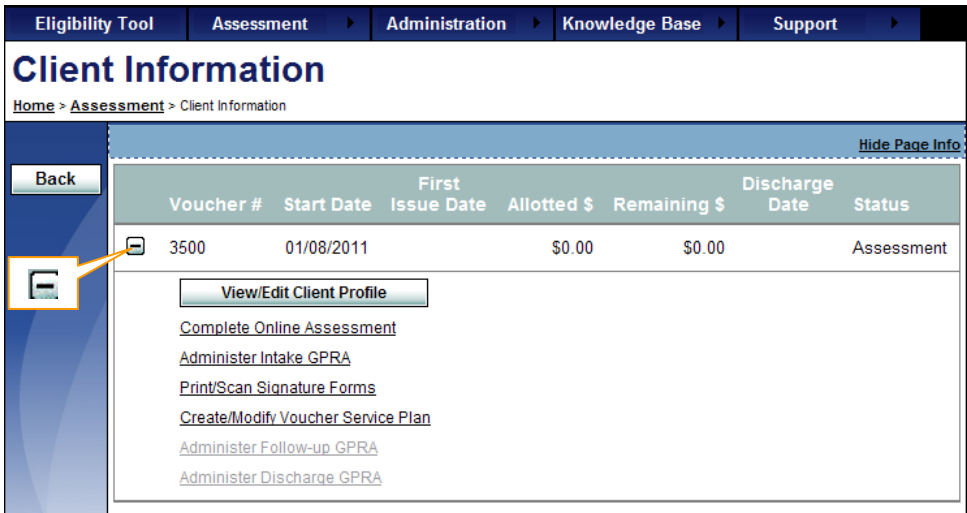
The Voucher Information module is designed to enter forms and information related to each client within the application.

- 1. Click **Assessment** from the Menu.
- 2. Click **Client Information** from the Assessment Landing Page.
- 3. Click the **Select** (Select) button to the left of the appropriate client.



(This is a sample screenshot of the Client Information Listing Page.)

- 1. The screen is defaulted to open with the **[-]** (minus sign) to the left of the Voucher #, which has the Voucher Information expanded.
- 2. To continue with entering the client's voucher information, you will need to click on the links (e.g. **Complete Online Assessment**) to enter the necessary client data.
Note: Click on the **[-] (Minus sign), it becomes a **[+]** (Plus sign) with the links no longer displaying. To make the links available click on the **[+]** (Plus sign).*
- 3. Click the **Back** (Back) button to return to the Listing page.



(This is a partial screenshot of Voucher Information Listing Page.)

Tips

- The links on the Voucher Information page (e.g. Complete Online Assessment, Administer Intake GPRA, Print/Scan Signature Forms) are linked to the client.

Complete Online Assessment

1. From the Client Information page, click the **Complete Online Assessment** link.

The screenshot shows the 'Client Information' page with a navigation bar at the top containing 'Eligibility Tool', 'Assessment', 'Administration', 'Knowledge Base', and 'Support'. Below the navigation bar is the title 'Client Information' and a breadcrumb trail 'Home > Assessment > Client Information'. On the left is a 'Back' button. The main content area has a 'Hide Page Info' link at the top right. Below it is a table with columns: Voucher #, Start Date, First Issue Date, Allotted \$, Remaining \$, Discharge Date, and Status. The table contains one row with Voucher # 3500, Start Date 01/08/2011, Allotted \$ 0.00, Remaining \$ 0.00, and Status Assessment. Below the table is a 'View/Edit Client Profile' button. To the right of this button is a callout box with the text 'Complete Online Assessment link' pointing to the 'Complete Online Assessment' link in the list of actions below the button. The other links in the list are 'Administer Intake GPRA', 'Print/Scan Signature Forms', 'Create/Modify Voucher Service Plan', 'Administer Follow-up GPRA', and 'Administer Discharge GPRA'.

(This is a sample screenshot of the Voucher Information Listing Page.)

2. Click the **Edit** button from the left toolbar.
3. The information that was entered for the Client profile will be displayed. Fill in the required fields and any optional fields you desire.
4. Click the **Save** button from the left toolbar.
5. Click the **Back** button to return to the Listing page.

*Note: To exit the screen without saving any changes, click the **Cancel** button.

The screenshot shows the 'Assessment Tool' page with a navigation bar at the top containing 'Eligibility Tool', 'Assessment', 'Administration', 'Knowledge Base', and 'Support'. Below the navigation bar is the title 'Assessment Tool' and a breadcrumb trail 'Home > Assessment > Client Information > Assessment Tool'. On the left is a toolbar with buttons: 'Cancel', 'Save', 'Delete', and 'Back'. The 'Save' button is highlighted with a callout box containing the text 'Save button'. The main content area has a 'Hide Page Info' link at the top right. Below it is a table with columns: Assessment Date, Client Name, Social Security Number, Address, State, Family Size, Referral Source Phone, Phone, Birth Date (mm/dd/yyyy), City, Zip Code, and Monthly Household Income. The table contains one row with the following data: Assessment Date 1/8/2011, Client Name Kelly Brown, Social Security Number 225-55-9999, Address 758 Plaza Dr, State RI, Family Size 1, Referral Source Phone 4123667188, Phone (401) 555-3625, Birth Date 10/19/1975, City Cranston, Zip Code 02910, and Monthly Household Income 675. A note '* Indicates Required Field' is located at the top right of the table area.

(Sample screenshot of the Assessment Tool Edit form)

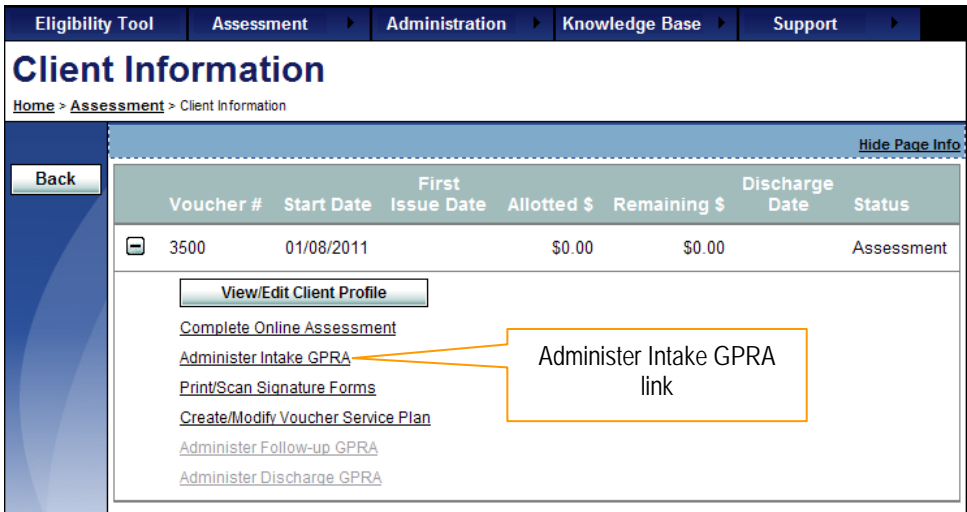
Tips

- If Other is selected as a **Potential Pay Source for Services**, a new field will appear asking you to specify what that other pay source is.





Administer Intake GPRA

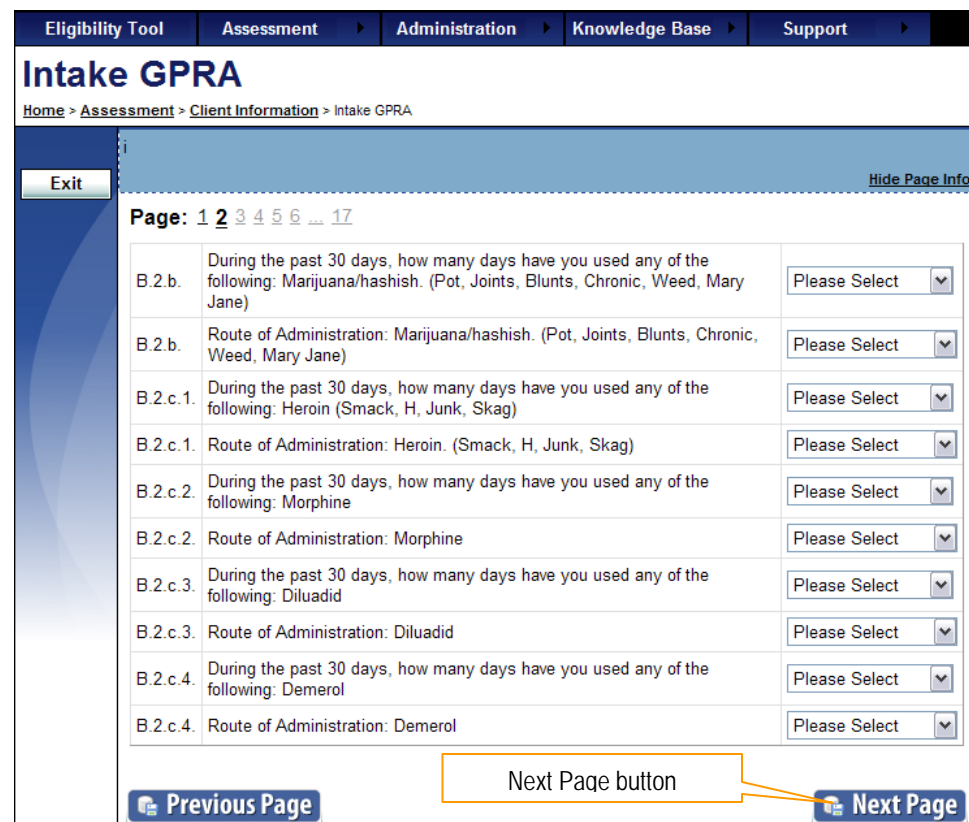
The Administer Intake GPRA is used to gather further information about a client.

1. From the Client Information page, click the **Administer Intake GPRA** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

2. Answer questions using the drop down list to the right of the question.
3. Click the  **(Next Page)** button to continue to the next page of questions or click the  **(Previous Page)** button to return to the previous page. (See table).
4. Continue in this manner until all the pages have been filled in.
5. Once you have answered all the questions, click the  **(Finish)** button.
6. Click the  **(Exit)** button to return to the Client Information Listing page.



(This is a screenshot of the Intake GPRA Survey.)

Below are the buttons that allow you to move within the GPRA Surveys.




This button moves you to the page directly after the one currently on



This button moves you to the page directly prior to the one currently on.

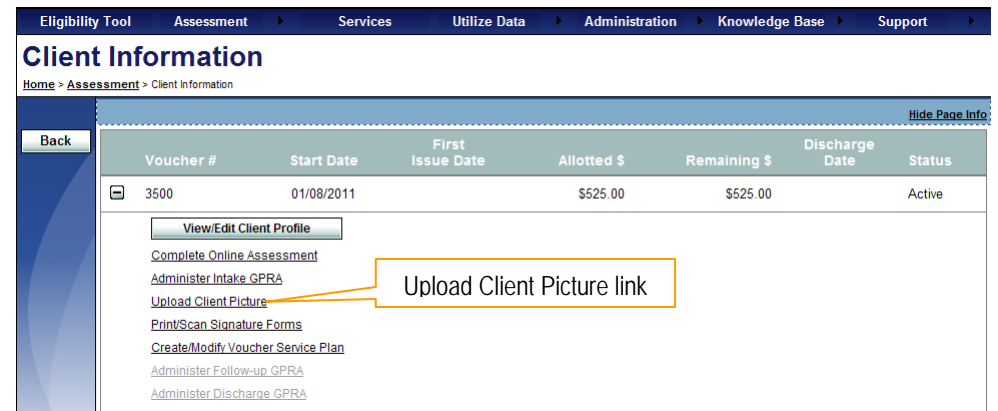
Tip

- Clicking on the  **(Next Page)** button will automatically save the current page.

Upload Client Picture

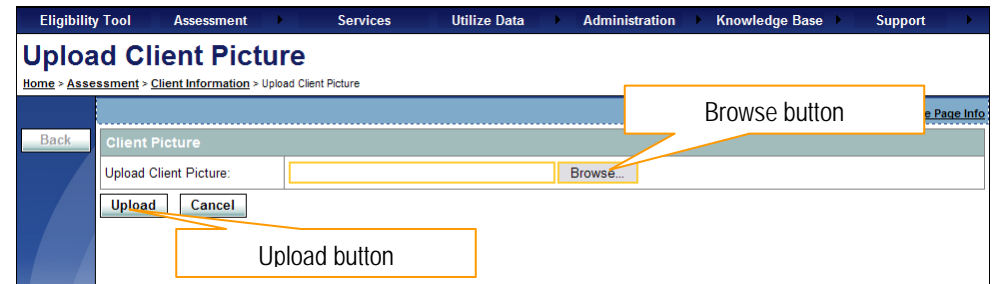
The Upload Client Picture module allows you to upload a picture of the client.

1. From the Client Information page, click the **Upload Client Picture** link.



(This is a sample screenshot of the Voucher Information Listing Page.)

2. Click the **Add** button from the left toolbar.
3. Click **Browse...** (**Browse**) button to browse your computer for the picture.
 - a. After clicking the **Browse...** (**Browse**) button, the Choose Files window opens displaying your files. Select the file, then click the **Open** button.
4. Click the **Upload** button.
5. Click the **Back** button to return to the Listing page.



(This is a sample screenshot of the Upload Client Picture edit form.)




Print/Scan Signature Forms

The Print/Scan Signature Forms are the Choice and Confidential Release Forms which grant permission to client information.

1. From the Client Information page, click the **Print/Scan Signature Forms** link.

The screenshot shows the 'Client Information' page with a navigation bar at the top containing 'Eligibility Tool', 'Assessment', 'Administration', 'Knowledge Base', and 'Support'. Below the navigation bar is the 'Client Information' title and a breadcrumb trail: 'Home > Assessment > Client Information'. A 'Back' button is on the left. The main content area has a 'Hide Page Info' link in the top right. Below this is a table with columns: 'Voucher #', 'Start Date', 'First Issue Date', 'Allotted \$', 'Remaining \$', 'Discharge Date', and 'Status'. The table contains one row with values: '3500', '01/08/2011', '\$0.00', '\$0.00', and 'Assessment'. Below the table is a list of links: 'View/Edit Client Profile', 'Complete Online Assessment', 'Administer Intake GPRA', 'Print/Scan Signature Forms', 'Create/Modify Voucher Service Plan', 'Administer Follow-up GPRA', and 'Administer Discharge GPRA'. The 'Print/Scan Signature Forms' link is highlighted with an orange box and labeled 'Print/Scan Signature Forms link'.

(This is a sample screenshot of the Voucher Information Listing Page.)

2. To download a Blank Form, click on the **Blank Form** link located to the right of the desired form.
3. A new window will open in a PDF File format.
 - a. Click the  (**Save**) button to save a copy to your computer. This must be done in order to use the digital signature.
 - b. To digitally sign the form, click on the  (**Sign**) button in the Adobe Reader submenu.
 - c. Click  (**Place Signature**) and you will need to drag your mouse to draw the area where signature needs to appear.
 - d. A new window will open and ask you to type in a password and to select the Appearance of the signature using radio buttons.
 - e. Click the **Sign** button.
4. Once you have signed and dated the form in the designated areas, save the form.
5. To close the window, click the  (**X**) in the upper right corner.

The screenshot shows the 'Upload Signature Forms' page with a navigation bar at the top containing 'Eligibility Tool', 'Assessment', 'Administration', 'Knowledge Base', and 'Support'. Below the navigation bar is the 'Upload Signature Forms' title and a breadcrumb trail: 'Home > Assessment > Client Information > Upload Signature Forms'. A 'Back' button is on the left. The main content area has a 'Hide Page Info' link in the top right. Below this are two sections: 'Choice' and 'Confidential Release'. Each section has an 'Add' button and a 'Blank Form' link. The 'Blank Form' link is highlighted with an orange box and labeled 'Blank Form link'.

(This is a screenshot of the Upload Signature Form Page.)

6. To upload the signed Form, click the (**Add**) button.
7. Click (**Browse**) button to browse your computer for the signed document.
 - a. After clicking the (**Browse**) button, the Choose Files window opens displaying your files. Select the file, then click the **Open** button.
8. Click the (**Upload**) button.
9. Click the (**Back**) button to return to the Listing page.

The screenshot shows a web application interface with a top navigation bar containing links: Eligibility Tool, Assessment, Administration, Knowledge Base, and Support. Below this is a header section titled "Upload Signature Forms" with a breadcrumb trail: Home > Assessment > Client Information > Upload Signature Forms. A "Hide Page Info" link is on the right. The main content area is divided into two sections. The "Choice" section contains an "Upload Choice:" label, a text input field, and a "Browse..." button. Below this are "Upload" and "Cancel" buttons. The "Confidential" section contains an "Add" button, the text "Confidential Release document not uploaded.", and a link to "Blank Form". Two orange callout boxes with arrows point to the "Upload" button (labeled "Upload button") and the "Browse..." button (labeled "Browse button").

(This is a screenshot of the Upload Signature Form Page.)

Tips

- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the forms (e.g., Confidential Release Forms, PDF, etc.).

Create/Modify Voucher Service Plan

1. From the Client Information page, click the **Create/Modify Voucher Service Plan** link.

Client Information
Home > Assessment > Client Information

Hide Page Info

Back

Voucher #	Start Date	First Issue Date	Allotted \$	Remaining \$	Discharge Date	Status
3500	01/08/2011		\$0.00	\$0.00		Assessment

View/Edit Client Profile

Complete Online Assessment

Administer Intake GPRA

Print/Scan Signature Forms

Create/Modify Voucher Service Plan

Administer Follow-up GPRA

Administer Discharge GPRA

Create/Modify Service Plan link

(This is a sample screenshot of the Voucher Information Listing Page.)

2. Click the **Edit** button from the left toolbar.
3. Select the care coordinator for the client from the **Care Coordinator** dropdown list.
4. Select the services the client is to receive from the **Add Service** dropdown lists for each section that is relevant to the client.
 - a. Click the **Add** button.
5. Enter in the number of sessions the client is planned to receive in the **# Sessions** field.
6. Click the **Add PID** button.
 - a. A new window will open displaying the program location information. Click the **Select** button to the left of the provider that will be providing the service.
 - b. Click the **Add to Plan** button.
7. If you wish to add any notes or comments to the Service Plan, click the **Add** button in the Comments section.

Voucher Service Plan
Home > Assessment > Client Information > Voucher Service Plan

Hide Page Info

Cancel Save Submit Back

Save button

View Voucher Dependencies

* Indicates Required Field

Service Plan - Voucher # 3500

Grant ID	T199984	Voucher Start Date	01/08/2011
Referral Src	TRN	Voucher End Date	07/08/2011
Allotted Cost	525.00	Voucher Status	Assessment
Care Coordinator			

Care Coordinator

Service	Info	Default Rate	# Sessions	Cost	# Sessions Remaining
Add Service: Mental Health - Group MH Counseling Add					

Treatment

Service	Info	Default Rate	# Sessions	Cost	# Sessions Remaining
Group Counseling Session		25.00	5	125.00	5
Remove					
PID	Rate	# Sessions Used	Cost	Start Date	End Date
TRN1 - Training Org 1	0.00	0	0.00		
Remove					
Add PID					

(This is a partial screenshot of the Voucher Service Plan Page.)

- a. The **Comment Type** will be defaulted to *Provider*.
- b. Enter a brief description of your note or comment in the **Comment** field.
- c. If you would like to upload a document pertinent to the client's service plan, click the **Browse...** (**Browse**) button.
 - i. After clicking the **Browse...** (**Browse**) button, the Choose Files window opens displaying your files. Select the file, then click the **Open** button.
- d. Click the **Save** (**Save**) button.

*Note: To cancel the comment, click the **Cancel** (**Cancel**) button.

8. Click the **Save** (**Save**) button from the left toolbar.

*Note: To exit the screen without saving any changes, click the **Cancel** (**Cancel**) button.

9. If you are ready to submit the Service Plan for review, click the **Submit** (**Submit**) button.

10. Click the **OK** (**OK**) button. If there are errors you will need to click the **View Voucher Dependencies** (**View Voucher Dependencies**) button.

11. Click the **Back** (**Back**) button to return to the Listing page.

(This is a partial screenshot of the Voucher Service Plan Page.)




(This is a partial screenshot of the Voucher Service Plan Page.)

Tips

- If a client has been inactive for 6 months after the First Issue date (no services have been entered) then their status on the Client Registration page will be updated to Inactive. If an attempt is made to edit the status then they will receive the following message: "This client has been inactive for 6 or more months; therefore funded ATR services can no longer be received."
- Once a service plan has been submitted, an email will be triggered to the Care Coordinator informing him/her of the services associated with the client.

View Voucher Dependencies

The **View Voucher Dependencies** is a validation tool used within the application to ensure that all the required parts are fulfilled when entering a client's information into the **Service Plan**. You are able to save the **Service Plan** if there are validation errors, but you will not be able to submit the **Service Plan** if there are errors.

1. If your **Service Plan** has errors, when you click the  (**Submit**) button you will receive an error message.
2. The  (**View Voucher Dependencies**) button enforces validation errors when creating the **Service Plan**.
3. A new window will open displaying the various parts entered into the **Service Plan**.
4. To close the new website window, click on the  (X) in the upper right hand corner.
5. Once you have corrected the errors, you will be able to submit the Service Plan.

GPRA Survey

Complete, With Errors

GPRA Survey Errors

- Page 1: B1b1 + B1b2 cannot be greater than B1a.
- Page 1: B1b2 cannot exceed B1a.
- Page 1: If B1a + B1c <= 30, then B1d cannot exceed the minimum poitive value of B1a and B1c.
- Page 1: B2a cannot exceed B1c.
- Page 1: If the first part of B2a is greater than zero, then the second part of B2a can not be -1.

Photo

Complete



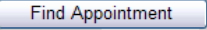
File: wtfareyoulookingat.bmp

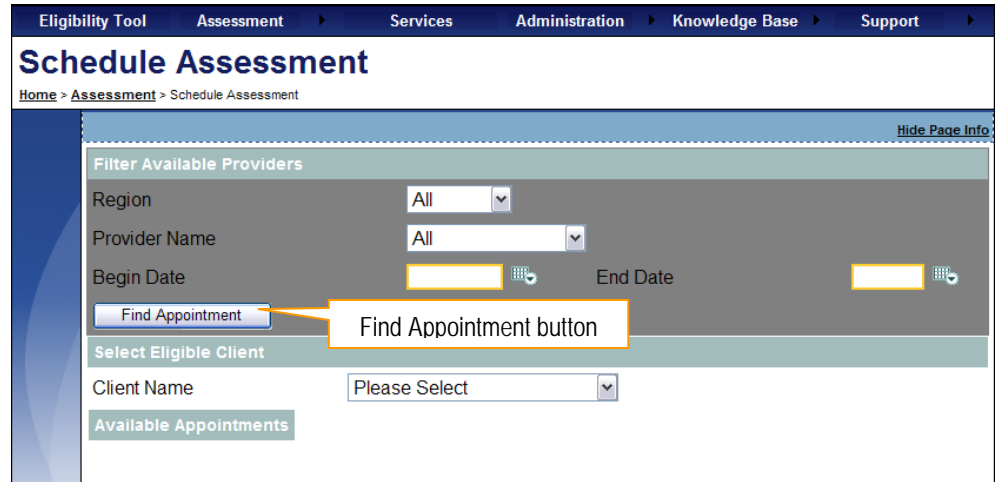
File Path: Download\Train_2008050216214466_P_wtfareyoulookingat.bmp

(This is a sample screenshot of the Voucher Dependencies form.)

Schedule Assessment

The Schedule Assessment module allows you to schedule an assessment with a client based on your availability. You must enter your availability using the Scheduler in the Administration module first.

1. Click **Assessment** from the Menu.
2. Click **Schedule Assessment** from the Assessment Landing page.
3. Select the region of the provider from the **Region** dropdown list. This is defaulted to display All regions.
4. Select the provider from the Provider Name dropdown list. This is defaulted to display All provider names.
5. Enter a date the assessment will begin in the **Begin Date** field or select the date by clicking on the calendar . (See [Calendar](#) section for further details).
6. Enter a date the assessment will end in the **End Date** field or select the date by clicking on the calendar . (See [Calendar](#) section for further details).
7. Select the client from the **Client Name** dropdown list.
8. Click the  (**Find Appointment**) button.

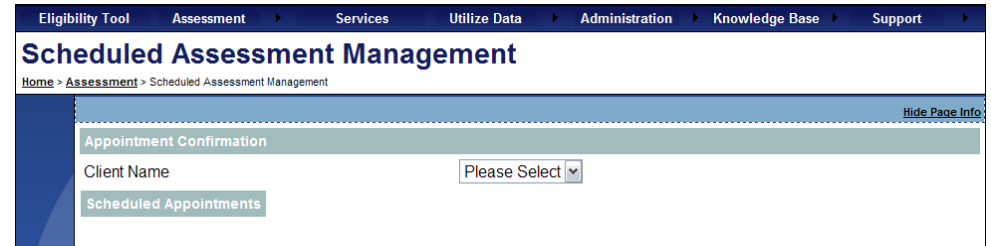


(This is a screenshot of the Schedule Assessment form.)

Scheduled Assessment Management

The Scheduled Assessment Management module allows you to view your scheduled appointments.

1. Click **Assessment** from the Menu.
2. Click **Schedule Assessment** from the Assessment Landing page.
3. Select the client from the **Client Name** dropdown list.



The screenshot shows a web application interface for 'Scheduled Assessment Management'. At the top is a dark blue navigation bar with links: 'Eligibility Tool', 'Assessment', 'Services', 'Utilize Data', 'Administration', 'Knowledge Base', and 'Support'. Below this is a white header area with the title 'Scheduled Assessment Management' and a breadcrumb trail 'Home > Assessment > Scheduled Assessment Management'. A 'Hide Page Info' link is visible on the right. The main content area has a light blue background and contains a section titled 'Appointment Confirmation'. Within this section, there is a 'Client Name' label followed by a dropdown menu currently displaying 'Please Select'. Below the dropdown is a button labeled 'Scheduled Appointments'.

(This is a screenshot of the Schedule Assessment Management form.)

Tips

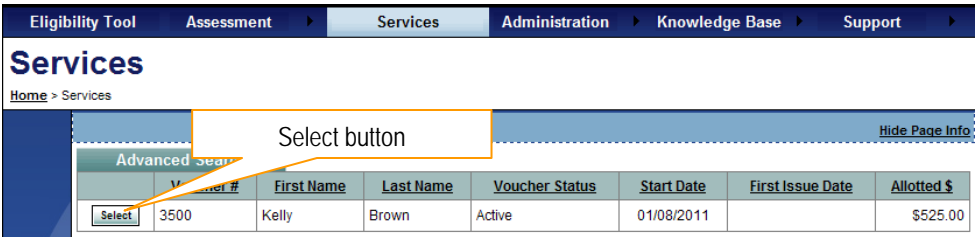
- If the Client dropdown list is empty, nothing has been scheduled for the staff member currently logged in.

SERVICES

The Services module is designed to track the voucher treatment and recovery support service transactions within the application.

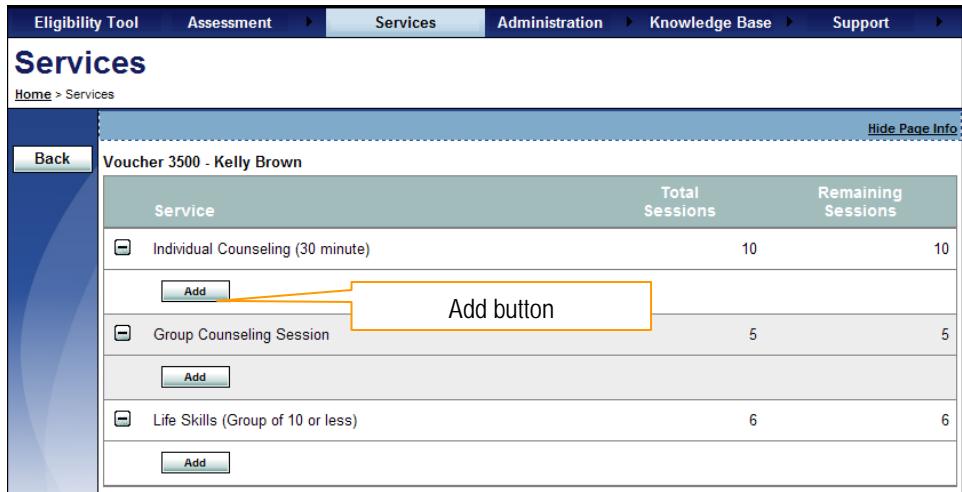
Add a Service Record

- 1. Click **Services** from the Menu.
- 2. From the Listing Page, select the client you wish to enter service information for by clicking the **Select** (Select) button to the left of the Voucher ID.



(This is a sample screenshot of the Services Listing Page.)

- 3. Click the **+** (plus sign) to the left of the appropriate service. The **+** (plus sign) will become a **-** (minus sign). To close the description, click on the **-** (minus sign).
- 4. To add session information, click the **Add** (Add) button.



(This is a sample screenshot of the Services Page.)

5. Fill in the required fields and any optional fields you desire.
6. Click the **Save** (Save) button from the left toolbar.
 *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
7. Click the **Back** (Back) button to return to the Listing page.

The screenshot shows the 'Service Record' page in the 'Eligibility Tool'. The page has a navigation bar with links: Eligibility Tool, Assessment, Services, Administration, Knowledge Base, and Support. Below the navigation bar is the title 'Service Record' and a breadcrumb trail 'Home > Service Record'. On the left side, there is a toolbar with 'Save' and 'Back' buttons. The 'Save' button is highlighted with an orange box and labeled 'Save button'. The main form area is titled 'Treatment' and contains the following fields:

Client	Kelly Brown
Service	Individual Counseling (30 minute)
PID	<input type="text"/>
Service Date	<input type="text"/>
Issue Time	<input type="text"/>
Duration	<input type="text"/> Hour(s) <input type="text"/> Minutes
Staff	<input type="text"/>
Additional Drug Tracking	<input type="text"/>
Next Meeting Date	<input type="text"/>
Notes	<input type="text"/>

At the top right of the form, there is a link 'Hide Page Info' and a note '* Indicates Required Field'.

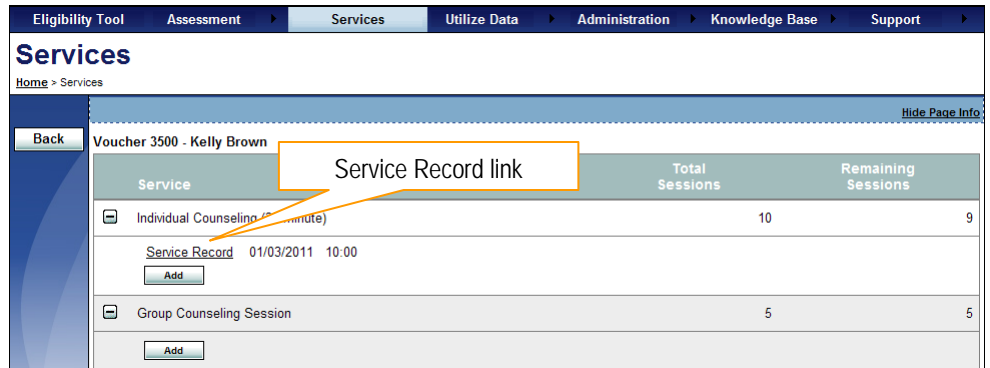
(This is a sample screenshot of the Individual Counseling Service Page.)

Tips

- Services are entered at the State Level into the Service Plan for each client. The clients that have your organization selected as the Service Provider will display when you enter in the various tabs within the application.
- The duration field is a required field based on the billing type of service.

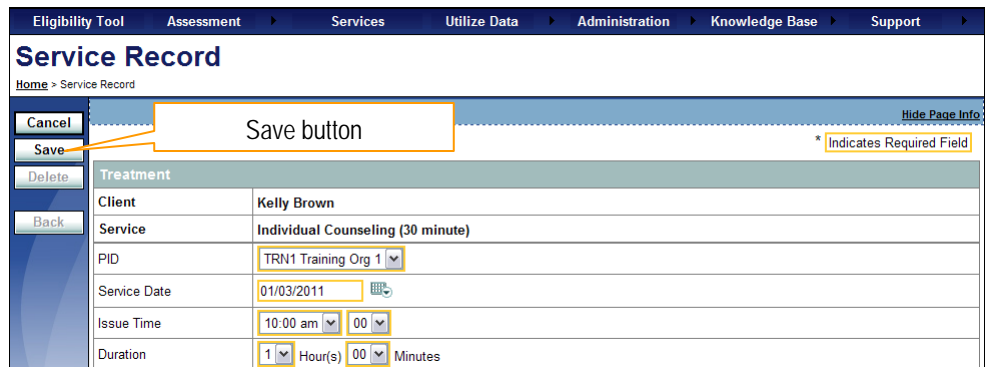
Editing a Service Record

1. From the Services Listing page, click the **Select** (Select) button next to the voucher that has the service that needs updated.
2. From the Services Page, click the **+** (plus sign) next to the service type that needs edited.
3. Select the Service Record you wish to edit by clicking on the appropriate **Service Record** link.



(This is a sample screenshot of the Services Page.)

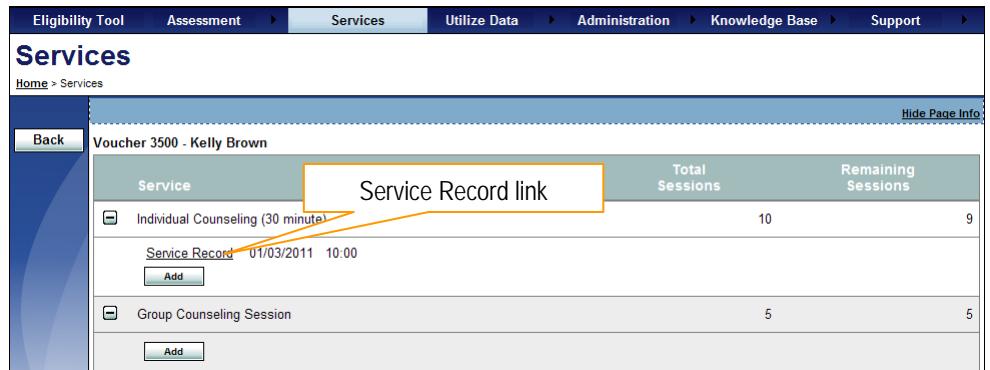
4. Click the **Edit** (Edit) button from the left toolbar.
5. The Service Record will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the **Save** (Save) button from the left toolbar.
 *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
8. Click the **Back** (Back) button to return to the Listing page.



(This is a sample screenshot of the Individual Counseling Service Page.)

Deleting a Service Record

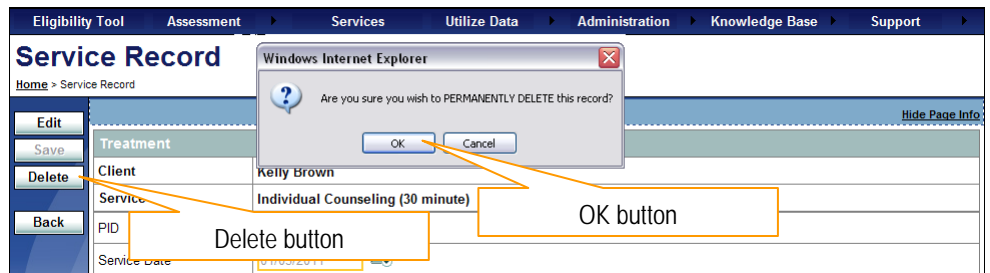
1. From the Services Listing page, click the **Select** (Select) button next to the voucher that has the service that needs deleted.
2. From the Services Page, click the **+** (plus sign) next to the service type that needs deleted.
3. Select the Service Record you wish to delete by clicking on the appropriate **Service Record** link.



(This is a sample screenshot of the Services Page.)

4. The Service Record will appear in the edit mode.
6. Click the **Delete** (Delete) button from the left toolbar.
7. You will receive a message asking if you are sure. Click the **OK** (OK) button to continue deleting the client.

*Note: To cancel the deletion, click the **Cancel** (Cancel) button.



(This is a sample screenshot of the Individual Counseling Service Page.)

Tips

- Services can be deleted if the service has not been fiscally approved. If the service has been fiscally approved then the service can only be deleted up to 14 days after the fiscal approval date.

UTILIZE DATA

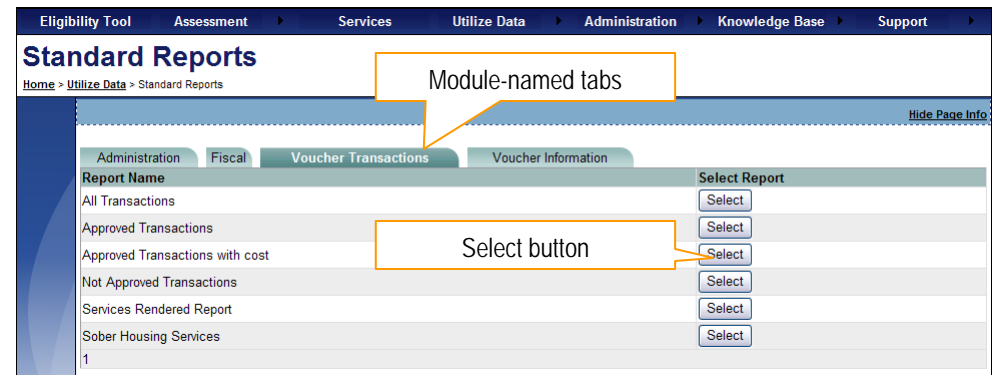
The Utilize Data module is designed to generate reports to assist with tracking, monitoring and assessing voucher information.

Standard Reports

The Standard Reports module enables you to have the ability to get specific voucher, fiscal and administration information through reports.

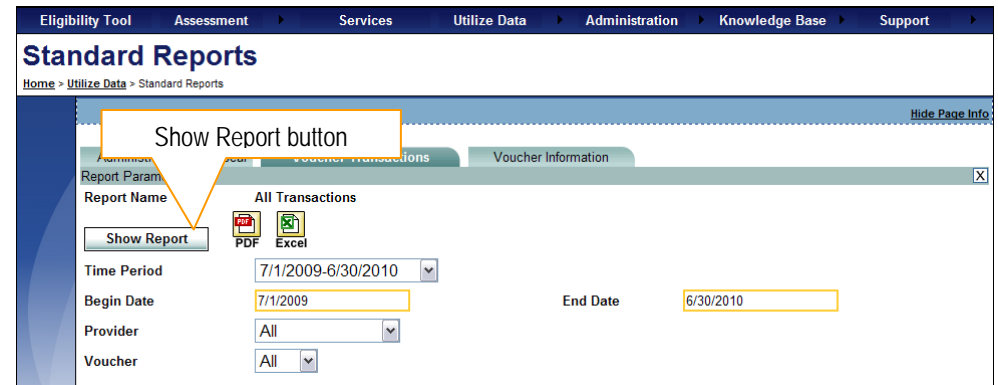
Selecting a Standard Report

1. Click **Utilize Data** from the Menu.
2. Click **Standard Reports** from the Utilize Data Landing Page.
3. Select the type of report you wish to view/print from the module-named tabs (i.e. Administration, Voucher Transactions, etc.)
4. Select the report you wish to view/print by clicking the **Select** (Select) button.



(This is a screenshot of the Standard Reports Page.)

5. Select any filtering parameters, if applicable.
6. Click the **Show Report** (Show Report) button.
7. A new window will open. To close the new window, click on the **X** (X) in the upper right corner.
8. Click on the **X** (X) in the upper right corner to return to the list of reports or click the module-named tab.



(This is a screenshot of the Standard Reports Page.)

Tips

- The RI ATR Application has the print icon for easier access to viewing reports, you may need to have Active X installed on your computer to utilize the icon. Active X is a free download that should allow you to use the print icon, click on the link to access the Active X site: http://www.download.com/windows/activex/1921-2206_4-0.html if you are unable to download Active X, contact your organization's IT department.
- If you have a pop-up blocker on your computer, hold the ctrl key on your keyboard down while selecting any button used to view the forms (e.g., Confidential Release Forms, PDF, etc.).

ADMINISTRATION

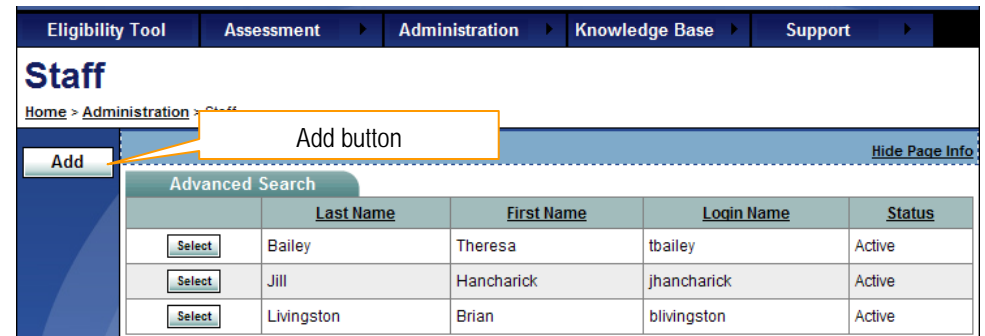
The Administration module is designed to complete administrative tasks within the application, such as updating organization information, staff registration, and changing a password.

Staff

The Staff module is used to register any staff members that should have access to the data entered within the application.

Adding a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Click the **Add** (Add) button.



(This is a sample screenshot of the Staff Listing Page.)

4. Enter the staff member's **General Information**.
 - a. Select the staff member's salutation from the **Salutation** dropdown list. This is an optional field.
 - b. Enter the staff member's first name in the **First Name** field.
 - c. Enter the staff member's last name in the **Last Name** field.
 - d. The **Status** is defaulted to Active.
 - i. Active: the staff member is currently with your organization (can be viewed on other screens and reports).
 - ii. Inactive: the staff member is no longer with your organization (will no longer appear on other screens and reports).
 - e. Select the staff member's credential from the **Credentials** dropdown list. This is an optional field.

The screenshot shows the 'Staff' page with a navigation bar at the top containing 'Eligibility Tool', 'Assessment', 'Administration', 'Knowledge Base', and 'Support'. Below the navigation bar is the 'Staff' title and a breadcrumb trail 'Home > Administration > Staff'. On the left, there is a sidebar with buttons: 'Cancel', 'Edit', 'Save', 'Delete', and 'Back'. The main content area features a 'General Information' section with the following fields:

- Salutation: dropdown menu
- Last Name: text input field
- First Name: text input field
- Status: dropdown menu (defaulted to 'Active')
- Credentials: dropdown menu

A 'Permissions' button is located on the right side of the form. A note indicates that an asterisk (*) denotes a required field.

(This is a partial screenshot of the Manage Staff Profile General Information fields.)

5. Enter the staff member's **Login Information**.

- Enter a **Login Name** for the staff member. This will be the User ID used by the staff member upon login.
- A **Password*** will need to be set up by the staff member. Click on reset password. The staff member should receive an email to activate the account. See the [Account Activation](#)- page 22 section for additional information.

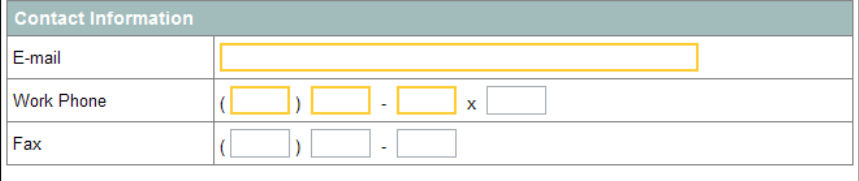


Login Information	
Login Name	<input type="text"/>
Password	<input type="password"/> <input type="button" value="Reset"/>
Is Care Coordinator?	<input type="checkbox"/>

(This is a screenshot displaying the Staff Login Information fields.)

6. Enter the staff member's **Contact Information**.

- Enter the staff member's email address in the **E-mail** field.
- Enter the staff member's work telephone number in the **Work Phone** field.
*Note: The Work Phone must be filled out in three fields. The fourth field is optional for an extension number.
- Enter the staff member's fax number in the **Fax** field. This is an optional field.



Contact Information	
E-mail	<input type="text"/>
Work Phone	(<input type="text"/>) <input type="text"/> - <input type="text"/> x <input type="text"/>
Fax	(<input type="text"/>) <input type="text"/> - <input type="text"/>

(This is a screenshot displaying the Staff Contact Information fields.)

7. Click the (**Save**) button from the left toolbar.

*Note: To exit the screen without saving any details, click the (Cancel) button.

8. Click the (**Back**) button to return to the Listing page.

Tips

- Setting the **Status*** to Inactive is used to keep the staff members in the database for history purposes but removed from all of the staff lists on the forms. When a staff member leaves your organization you will not be able to delete the staff member, but you can change the **Status*** to Inactive to remove their name from forms and prevent the staff member from entering the application.
- If the email address is updated on the staff account, the staff member will need to re-activate their account.

Permissions

The Staff Permissions module allows a user to assign permissions to access the forms within RI ATR.

1. From the Staff Edit form, click the **Permissions** button.
2. Click the **Edit** button from the left toolbar.
3. Select a permission role from the **Apply Pre-Defined Permissions** dropdown list. See the Apply Pre-Defined Permissions section for additional information.
4. If you wish to modify the pre-defined permissions, select the radio button next to the appropriate permission level for each module.
 - a. No Permission: staff member has no access to the module
 - b. Read Only: staff member is able to view the data only
 - c. Full: staff member is able to view, add, edit, and delete the data
5. Click the **Save** button from the left toolbar.

Note:* To exit the screen without saving any changes, click the **Cancel button.
6. Click the **Back** button to return to the Staff edit form.

Save button

Hide Page Info

* Indicates Required Field

System Permissions - Theresa Bailey

Apply Pre-Defined Permissions

Home	
Eligibility Tool	<input type="radio"/> No Permission <input checked="" type="radio"/> Full
Assessment	
Client Information	
Register Client	<input type="radio"/> No Permission <input type="radio"/> Read Only <input checked="" type="radio"/> Full
Client Locator Tracking Form	<input type="radio"/> No Permission <input checked="" type="radio"/> Full
Assessment Tool	<input type="radio"/> No Permission <input type="radio"/> Read Only <input checked="" type="radio"/> Full
Upload Client Picture	<input type="radio"/> No Permission <input type="radio"/> Read Only <input checked="" type="radio"/> Full

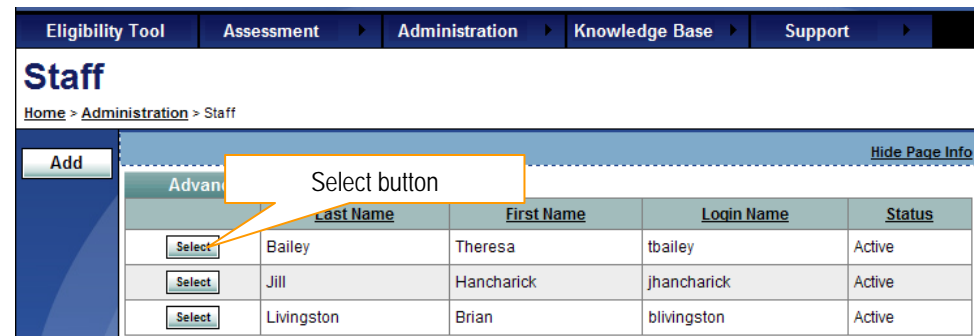
(This is a sample screenshot of the Staff Permissions Edit form)

Tips

- When changing permissions, the account must log out for the change in the permission level to take place.

Editing a Staff Member

1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Select the staff member you wish to edit by clicking the **Select** (Select) button to the left of the staff member's name.



(This is a sample screenshot of the Staff Listing Page.)

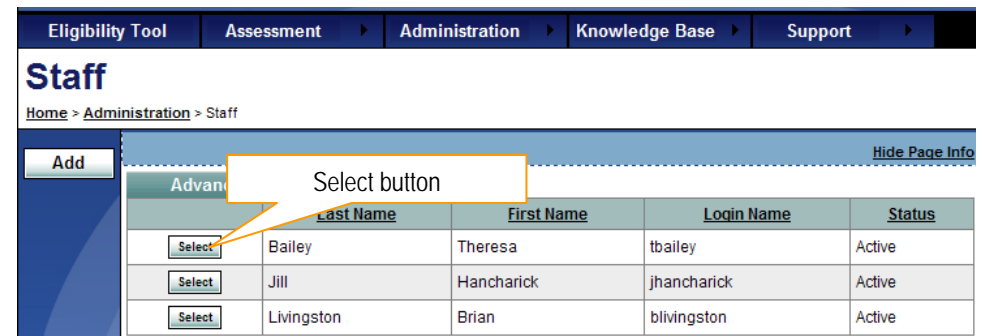
4. Click the **Edit** (Edit) button from the left toolbar.
5. The staff member will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the **Save** (Save) button from the left toolbar.
*Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
8. Click the **Back** (Back) button to return to the Listing page.

The screenshot shows the 'Staff Edit Form'. The navigation bar and breadcrumb trail are the same as the previous screenshot. The left toolbar now has 'Edit', 'Save', 'Delete', and 'Back' buttons. A callout box labeled 'Edit button' points to the 'Edit' button. The main area shows a form titled 'General Information' with fields for 'Salutation', 'Last Name' (Bailey), 'First Name' (Theresa), 'Status' (Active), and 'Credentials'. A 'Permissions' button is visible in the top right corner.

(This is a sample screenshot of the Staff Edit Form.)

Deleting a Staff Member

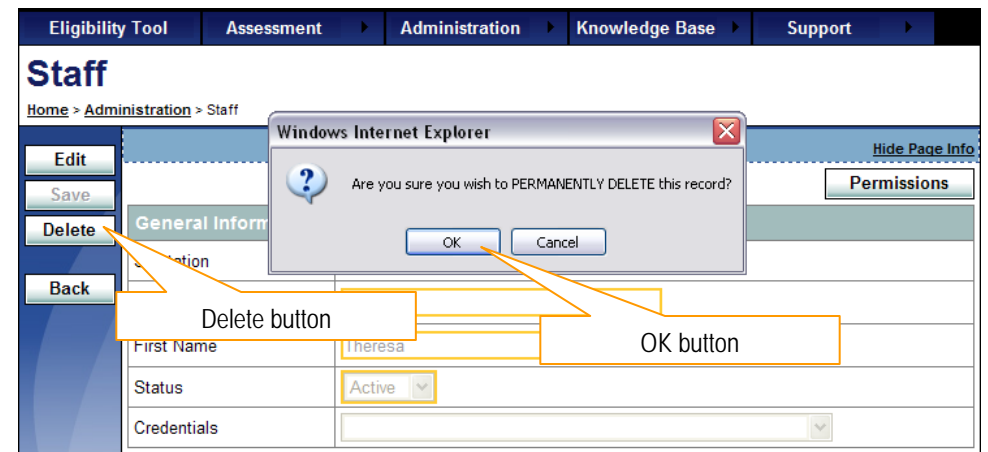
1. Click **Administration** from the Menu.
2. Click **Staff** from Administration Landing Page.
3. Select the staff member you wish to delete by clicking the **Select** (Select) button to the left of the staff member's name.



(This is a sample screenshot of the Staff Listing Page.)

4. Click the **Delete** (Delete) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the **OK** (OK) button to continue deleting the staff member.

*Note: To cancel the deletion, click the **Cancel** (Cancel) button.



(This is a sample screenshot of the Staff Page Edit Form.)



Tips

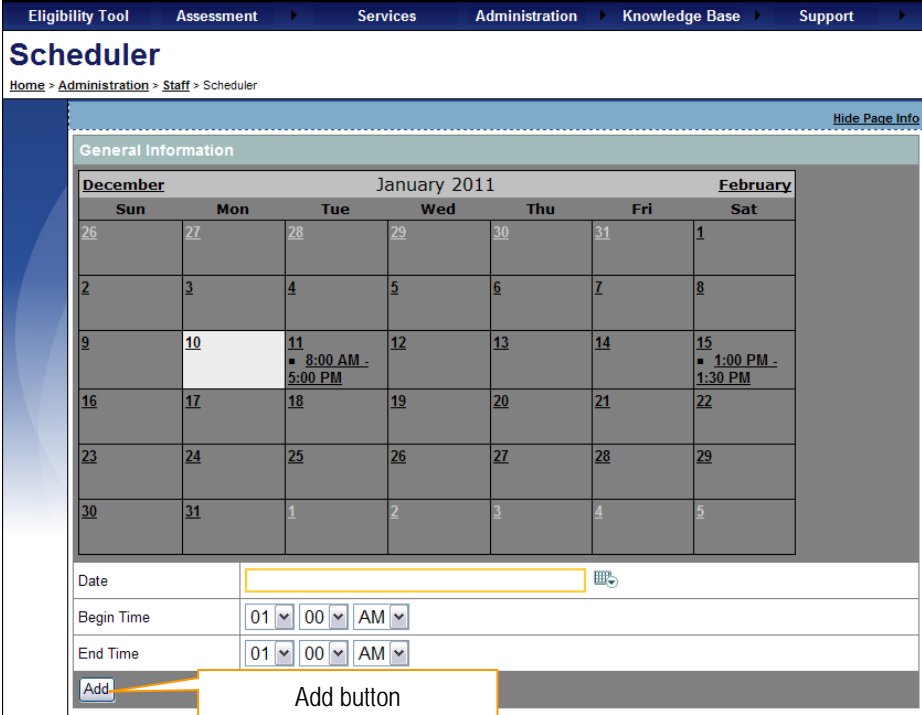
- You will not be able to delete a staff member if it is associated with any other details. In this instance, set the **Status*** of the staff member to Inactive.

Scheduler

The Scheduler is available to allow staff to enter their availability for scheduling assessment meetings with clients.

Adding Availability

1. Click **Administration** from the Menu.
2. Click **Scheduler** from Administration Landing Page.
3. Enter the date the staff member has available time in the **Date** field or select the date by clicking on the calendar . (See [Calendar](#) section for further details).
4. Select a begin time from the Begin Time dropdown lists.
5. Select an end time from the End Time dropdown list.
6. Click the  (**Add**) button.
7. The available time slot will appear on the calendar.



Eligibility Tool Assessment Services Administration Knowledge Base Support

Scheduler

Home > Administration > Staff > Scheduler

Hide Page Info

General Information

December			January 2011			February	
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
26	27	28	29	30	31	1	
2	3	4	5	6	7	8	
9	10	11 ■ 8:00 AM - 5:00 PM	12	13	14	15 ■ 1:00 PM - 1:30 PM	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31	1	2	3	4	5	

Date

Begin Time 01:00 AM

End Time 01:00 AM

Add button

(This is a sample screenshot of the Scheduler Edit form.)

Edit Availability

1. Click **Administration** from the Menu.
2. Click **Scheduler** from Administration Landing Page.
3. Select the time slot from the calendar.
4. Make any changes to the details.
5. Click the **Update** (Update) button.
 *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
6. The available time slot will appear on the calendar.

Eligibility Tool Assessment Services Administration Knowledge Base Support

Scheduler

Home > Administration > Staff > Scheduler

Hide Page Info

* Indicates Required Field

General Information

December			January 2011				February
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
26	27	28	29	30	31	1	
2	3	4	5	6	7	8	
9	10 9:00 AM - 11:00 AM	11 8:00 AM - 5:00 PM	12	13	14	15 1:00 PM - 1:30 PM	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31	1	2	3	4	5	

Date: 1/10/2011

Begin Time: 09:00 AM

End Time: 11:00 AM

End Time: Active

Update Remove Cancel

Update button

(This is a sample screenshot of the Scheduler Edit form.)

Delete Availability

1. Click **Administration** from the Menu.
2. Click **Scheduler** from Administration Landing Page.
3. Select the time slot from the calendar.
4. Click the **Remove** (Remove) button.

*Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.

The screenshot shows the 'Scheduler' interface with a navigation bar at the top containing 'Eligibility Tool', 'Assessment', 'Services', 'Administration', 'Knowledge Base', and 'Support'. Below the navigation bar is the 'Scheduler' title and a breadcrumb trail: 'Home > Administration > Staff > Scheduler'. A 'Hide Page Info' link is in the top right corner. A note '* Indicates Required Field' is present. The main section is titled 'General Information' and contains a calendar for January 2011. The calendar shows days from Sunday to Saturday. On January 10th, a time slot is selected from 9:00 AM to 11:00 AM. Below the calendar, there are input fields for 'Date' (1/10/2011), 'Begin Time' (09:00 AM), 'End Time' (11:00 AM), and a dropdown for 'End Time' (Active). At the bottom, there are three buttons: 'Update', 'Remove', and 'Cancel'. The 'Remove' button is highlighted with an orange box and labeled 'Remove button'.

(This is a sample screenshot of the Scheduler Edit form.)

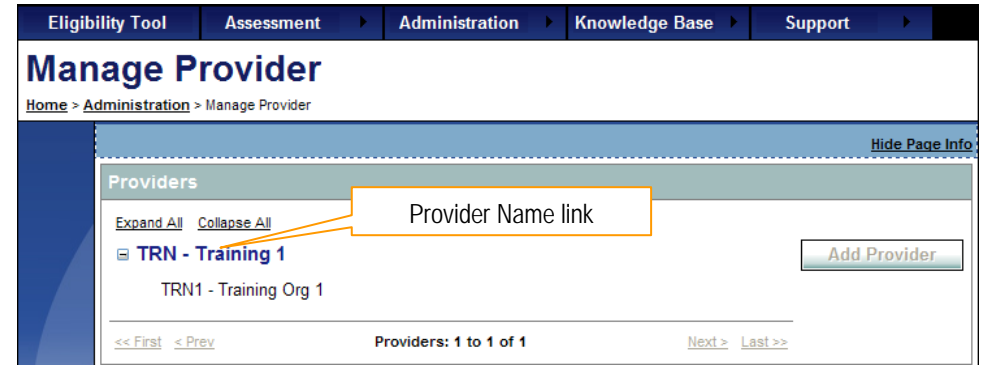
Manage Provider

The Manager Provider module allows the user to add and edit locations and contact and service information for providers and PIDs. This information only needs to be updated on an as-needed basis.

***Note:** The staff member with the admin permission level is the only person capable of editing this screen within each organization.

Viewing and Editing Provider Details

1. Click **Administration** from the Menu.
2. Click **Manage Provider** from the Administration Landing Page.
3. Click the **Provider Name** link.



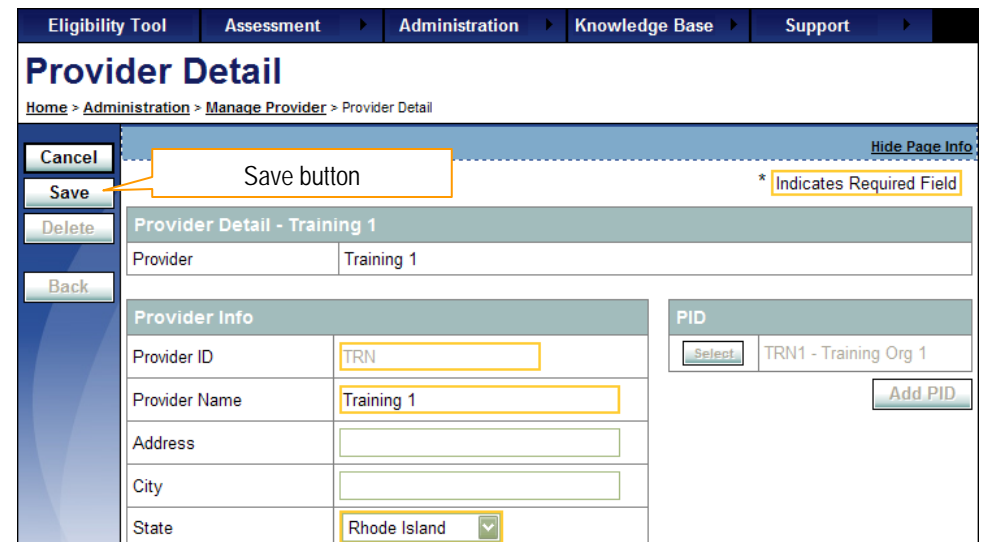
The screenshot shows the 'Manage Provider' interface. At the top is a navigation bar with links: Eligibility Tool, Assessment, Administration, Knowledge Base, and Support. Below the navigation bar is the title 'Manage Provider' and a breadcrumb trail: Home > Administration > Manage Provider. The main content area is titled 'Providers' and contains a table with one entry: 'TRN - Training 1' with a sub-entry 'TRN1 - Training Org 1'. A callout box points to the 'TRN - Training 1' link, labeled 'Provider Name link'. To the right of the table is an 'Add Provider' button. At the bottom of the table, there are pagination controls: '<< First', '< Prev', 'Providers: 1 to 1 of 1', 'Next >', and 'Last >>'. A 'Hide Page Info' link is in the top right corner.

(This is a sample screenshot of the Manage Provider Listing Page.)

4. Click the **Edit** (Edit) button from the left toolbar.
5. Edit the Provider Info to include your organization's information.
6. Select a staff member to serve as the primary contact for your organization from the Staff dropdown list.
7. Click the **Save** (Save) button from the left toolbar.
8. Click the **Back** (Back) button to return to the Listing page.

***Note:** The email, work phone, and fax will populate with information added from the [Staff](#) module.

***Note:** To exit the screen without saving any changes, click the **Cancel** (Cancel) button.



The screenshot shows the 'Provider Detail' edit form. At the top is a navigation bar with links: Eligibility Tool, Assessment, Administration, Knowledge Base, and Support. Below the navigation bar is the title 'Provider Detail' and a breadcrumb trail: Home > Administration > Manage Provider > Provider Detail. The main content area is titled 'Provider Detail - Training 1'. On the left is a toolbar with buttons: Cancel, Save, Delete, and Back. A callout box points to the 'Save' button, labeled 'Save button'. The form contains two main sections: 'Provider Info' and 'PID'. The 'Provider Info' section has fields for Provider ID (TRN), Provider Name (Training 1), Address, City, and State (Rhode Island). The 'PID' section has a 'Select' button and a dropdown menu showing 'TRN1 - Training Org 1'. An 'Add PID' button is to the right of the PID section. A note '* Indicates Required Field' is in the top right corner. A 'Hide Page Info' link is in the top right corner.


(This is a sample screenshot of the Provider Detail Edit form)

Tips

- Only the state can change the Provider ID and Provider Name information. If any information is incorrect for your organization, submit a request through the online support site [Contact Support](#) link or contact the state.

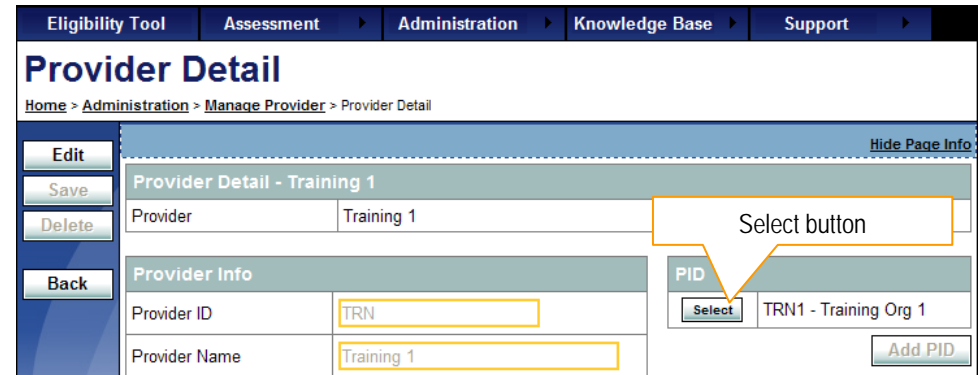
Viewing and Editing PID Details

The PID Info can be accessed in two (2) ways:

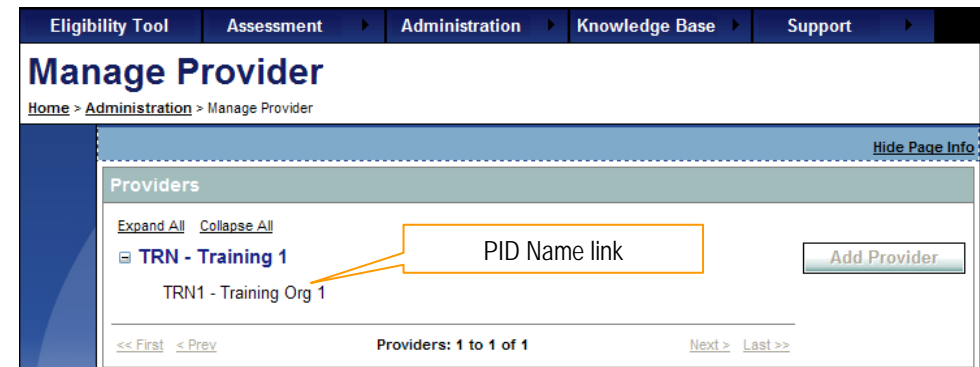
- From the Provider Details page, click the  (Select) button from the PIDs grid.

or

- Click **Administration** from the Menu.
- Click **Manage Provider** from the Administration Landing Page.
- Click the **Provider Name** link to display the PIDs associated with it.
- Click the **PID Name** link.



(Access Way 1: Sample screenshot displaying the Provider Detail edit form)



(Access Way 2: Sample screenshot displaying the Manage Provider Listing page)

1. Click the **Edit** (**Edit**) button from the left toolbar.
2. Edit the PID Info to include your location's information.
3. Select a staff member to serve as the primary contact for your location from the Staff dropdown list.
*Note: The email, work phone, and fax will populate with information added from the [Staff](#) module.
4. Click the **Save** (**Save**) button from the left toolbar.
*Note: To exit the screen without saving any changes, click the **Cancel** (**Cancel**) button.
5. Click the **Back** (**Back**) button to return to the Listing page.

Eligibility Tool | Assessment | Administration | Knowledge Base | Support

Location Detail

Home > Administration > Manage Provider > Location Detail

Cancel Save Delete Back

Save button

* Indicates Required Field

Location Detail - Training Org 1

Provider	Training 1
PID	Training Org 1

PID Info

PID	TRN1
PID Name	Training Org 1
Address	5700 Corporate Drive
City	Pittsburgh
State	Rhode Island

(Sample screenshot displaying the Location Detail edit form)

Services Offered

1. From the Location Details edit form, click the **Services Offered** (**Services Offered**) button.
2. Click the **Edit** (**Edit**) button from the left toolbar.
3. Select the checkboxes to indicate the services you provide. Uncheck the checkboxes for services that your Organization does not provide.
4. Click the **Save** (**Save**) button from the left toolbar.
*Note: To exit the screen without saving any changes, click the **Cancel** (**Cancel**) button.
5. Click the **Back** (**Back**) button to return to the Listing page.

Eligibility Tool | Assessment | Administration | Knowledge Base | Support

Services Offered

Home > Administration > Manage Provider > Location Detail > Services Offered

Edit Save Back

Edit button

Services Offered - Training Org 1

Provider	Training 1
PID	Training Org 1

Available Services

	Modality	Service	Default Rate \$
<input checked="" type="checkbox"/>	Day Treatment	Day Treatment	500.00
<input checked="" type="checkbox"/>	Day Treatment	Day Treatment (Adolescent)	100.00
<input checked="" type="checkbox"/>	Inpatient/Hospital (not Detox)	COD Enhanced IOP	25.00
<input checked="" type="checkbox"/>	Inpatient/Hospital (not Detox)	IOP	25.00
<input checked="" type="checkbox"/>	Outpatient	Family/Couple Counseling	25.00

(This is a sample screenshot of the Services Provided page.)

Change Password

The Change Password module allows the user to change the password on the account they are currently logged into.

1. Click **Administration** from the Menu.
2. Click **Change Password** from the Administration Landing Page.
3. Enter the current password for the account in the **Current Password** field.
4. Enter a password you would like to use in the **New Password** field.
5. Re-type the new password in the **Confirm New Password** field.
6. Click the (**Change**) button.
**Note: To exit the screen without saving any changes, click the (Cancel) button.*
7. You will receive a confirmation message indicating the password was changed successfully. Click (**OK**) to continue.

(This is a screenshot of the Change Password Page.)


Tips

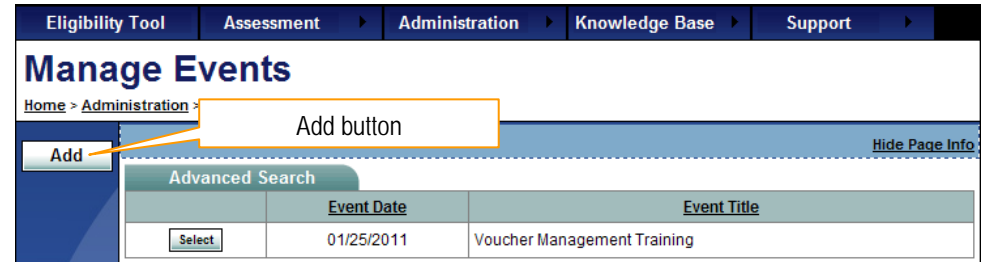
- It is important to remember that passwords are case sensitive.
- Passwords must have a minimum 8 characters in length, have 1 upper case character, have 1 number, and cannot use User ID as part of password.
- You will be prompted to change your password every 90 days.

Manage Events

The Manage Events module is designed to add, edit or delete events in the Events Calendar. Events added at provider level will only be viewed by that provider.

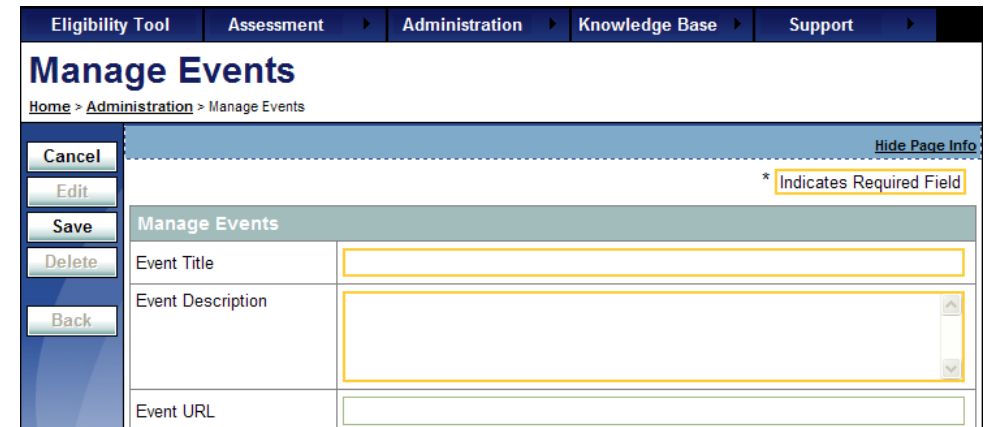
Adding an Event

1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Click the  (**Add**) button from the left toolbar.



(This is a sample screenshot of the Manage Events Listing Page.)

4. Enter a brief description of the event in the **Event Title** field.
5. Enter the description of the event in the **Event Description** field.
6. If there is a website associated with the event, enter the website address in the **Event URL** field.

A partial screenshot of the 'Manage Events' edit form. The top navigation bar is the same as the previous screenshot. The page title is 'Manage Events'. Below the title is a breadcrumb trail: 'Home > Administration > Manage Events'. On the left, there is a vertical toolbar with buttons: 'Cancel', 'Edit', 'Save', 'Delete', and 'Back'. The main content area has a header 'Manage Events' and a form with three fields: 'Event Title', 'Event Description', and 'Event URL'. The 'Event Title' field is highlighted with an orange box. A legend indicates that an asterisk (*) denotes a required field. A 'Hide Page Info' link is in the top right corner.

(This is a partial screenshot of the Manage Events edit form)

7. Select the date(s) the event will take place using the Event Dates calendar.
You may select multiple dates.
 - a. Select the month the event will take place from the first dropdown list. This is defaulted to the current month.
 - b. Select the year the event will take place from the second dropdown list. This is defaulted to the current year.
 - c. Select the days the event will take place using the calendar.
 - i. To remove a selected date, click the **(Remove)** button to the right of the date.
12. Click the (**Save**) button from the left toolbar.

**Note:* To exit the screen without saving any changes, click the (Cancel) button.
13. Click the (**Back**) button to return to the Listing page.

Event Dates

01/04/2011

January

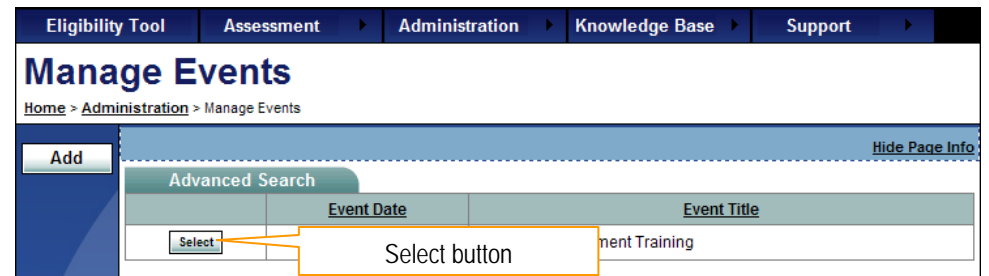
2011

Dec	January 2011						Feb
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
26	27	28	29	30	31	1	
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31	1	2	3	4	5	

(This is a partial screenshot of the Manage Events edit form)

Editing an Event

1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Select the event you wish to edit by clicking the **Select** (Select) button to the left of the event date.



(This is a sample screenshot of Manage Events Listing Page.)

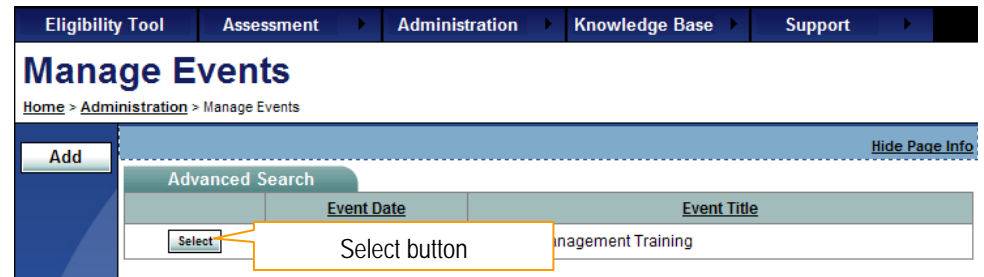
4. Click the **Edit** (Edit) button from the left toolbar.
5. The event will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the **Save** (Save) button from the left toolbar.
- *Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
8. Click the **Back** (Back) button to return to the Listing page.

A screenshot of the 'Manage Events' edit form. The top navigation bar and breadcrumb trail are the same as in the previous screenshot. The left toolbar now includes 'Cancel', 'Save', 'Delete', and 'Back'. The main content area is titled 'Manage Events' and contains a form with the following fields: 'Event Title' (containing 'Voucher Management Training'), 'Event Description' (containing 'This is a training on the voucher management system. We will cover the VMS, GPRA and overview of ATR.'), 'Event URL' (empty), and 'Event Dates' (containing '01/25/2011', a 'Remove' button, 'January', and '2011'). An orange callout box points to the 'Save' button in the left toolbar with the text 'Save button'. Another orange callout box points to the 'Event Title' field with the text '* Indicates Required Field'.

(This is a partial screenshot of the Manage Events edit form)

Deleting an Event

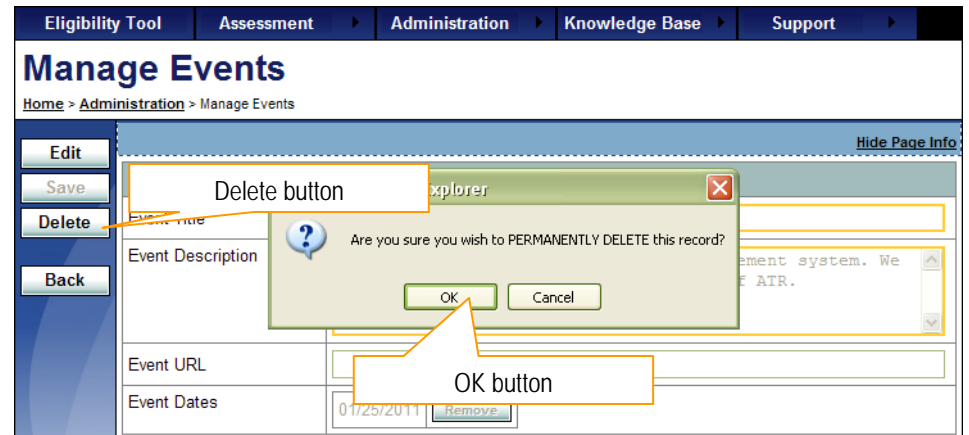
1. Click **Administration** from the Menu.
2. Click **Manage Events** from the Administration Landing Page.
3. Select the event you wish to delete by clicking the **Select** (Select) button to the left of the event date.



(This is a sample screenshot of Manage Events Listing Page.)

4. Click the **Delete** (Delete) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the **OK** (OK) button to continue deleting the event.

*Note: To cancel the deletion, click the **Cancel** (Cancel) button.



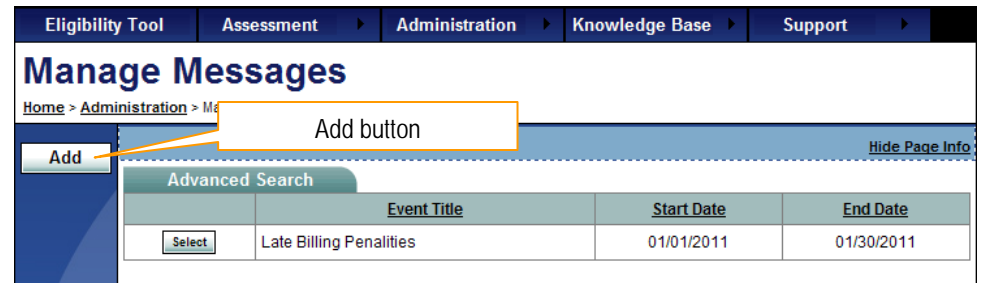
(This is a partial screenshot of the Manage Events edit form)

Manage Messages

The Manage Messages module is designed to add, edit or delete messages that display on the Home screen. Messages added at county level will only be viewed by that county and their providers.

Adding a Message

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page.
3. Click the **Add** (Add) button from the left toolbar.



(This is a sample screenshot of Manage Messages Listing Page.)

4. Enter a brief description of the message in the **Message Title** field.
5. Enter the description of the message in the **Message Body** field.
6. Enter the **From Date*** and the **To Date*** for when you would like the message to be displayed or select the dates by clicking on the calendar . (See [Calendar](#) section for further details)
7. Click the **Save** (Save) button from the left toolbar.
*Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
8. Click the **Back** (Back) button to return to the Listing page.

This screenshot shows the 'Manage Messages' edit form. It has the same navigation bar and title as the listing page. The breadcrumb trail is: Home > Administration > Manage Messages. The left toolbar now includes a 'Cancel' button at the top. The main form area has a 'Manage Messages' header and a table with fields: Message Title, Message Body, Start Date, and End Date. The Message Title and Message Body fields are text boxes. The Start Date and End Date fields are date pickers with calendar icons. A note '* Indicates Required Field' is in the top right. The 'Save' button in the toolbar is highlighted with an orange box.

Message Title	Message Body	Start Date	End Date

(This is a screenshot of the Manage Messages edit form.)

Editing a Message

1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page
3. Select the message you wish to edit by clicking the **Select** (Select) button to the left of the message title.

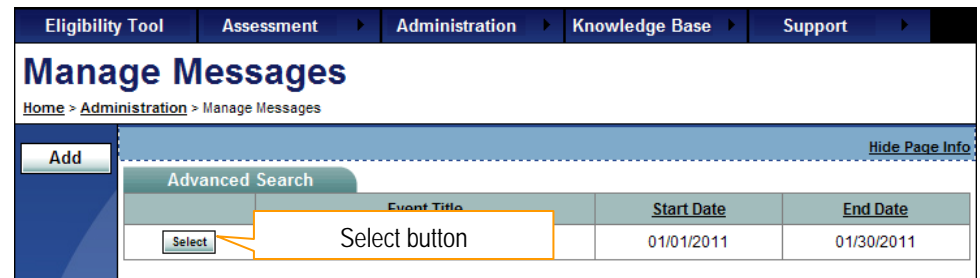
(This is a sample screenshot of Manage Messages Listing Page.)

4. Click the **Edit** (Edit) button from the left toolbar.
5. The message will appear in the edit mode.
6. Make any changes needed to the details.
7. Click the **Save** (Save) button from the left toolbar.
*Note: To exit the screen without saving any changes, click the **Cancel** (Cancel) button.
8. Click the **Back** (Back) button to return to the Listing page.

(This is a sample screenshot of the Manage Messages edit form.)

Deleting a Message

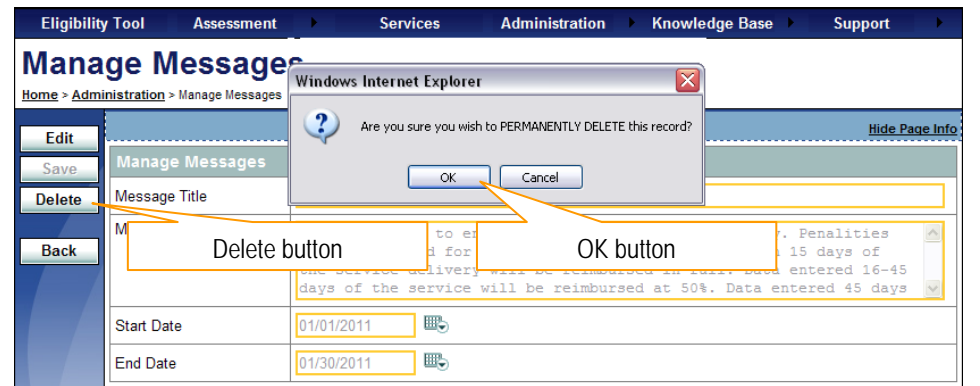
1. Click **Administration** from the Menu.
2. Click **Manage Messages** from the Administration Landing Page.
3. Select the message you wish to delete by clicking the **Select** (Select) button to the left of the message title.



(This is a sample screenshot of Manage Messages Listing Page.)

4. Click the **Delete** (Delete) button from the left toolbar.
5. You will receive a message asking if you are sure. Click the **OK** (OK) button to continue deleting the event.

*Note: To cancel the deletion, click the **Cancel** (Cancel) button.




(This is a sample screenshot of the Manage Messages edit form.)

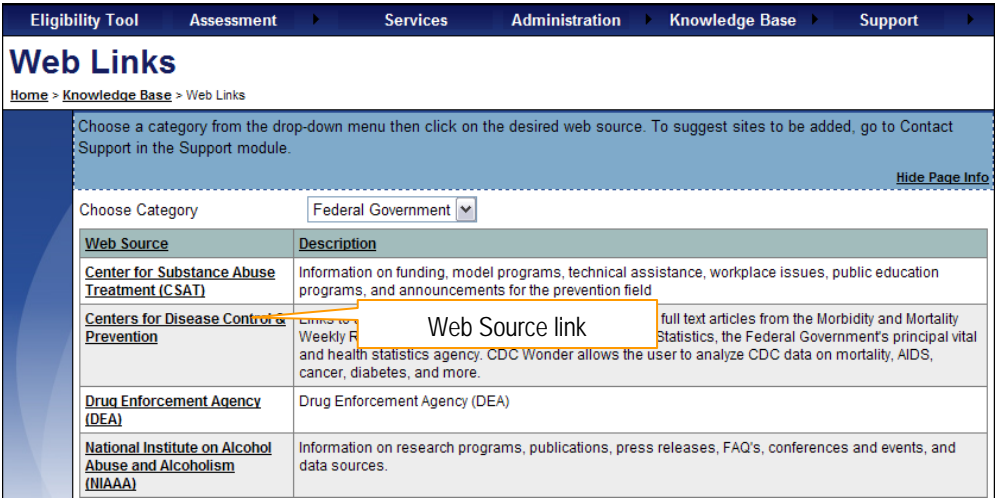
KNOWLEDGE BASE

The Knowledge Base module is a warehouse of documents and web source information designed to provide pertinent data.

Web Links

The Web Sources section of Knowledge Base is useful for finding a wealth of health and human service links. The Web Source section can be utilized by following these steps:

- 1. Click **Knowledge Base** from the Menu.
- 2. Click **Web Links** from the Knowledge Base Landing Page.
- 3. Select a category from the **Choose Category** dropdown list.
- 4. Browse the Web Sources List for the website you would like to visit.
- 5. Click on the link of the name of the **Web Source**.
- 6. A new window will open displaying the website you chose.
- 7. To close the new website window, click on the  (X) in the upper right hand corner.






(This is a partial screenshot of the Web Links Listing Page.)

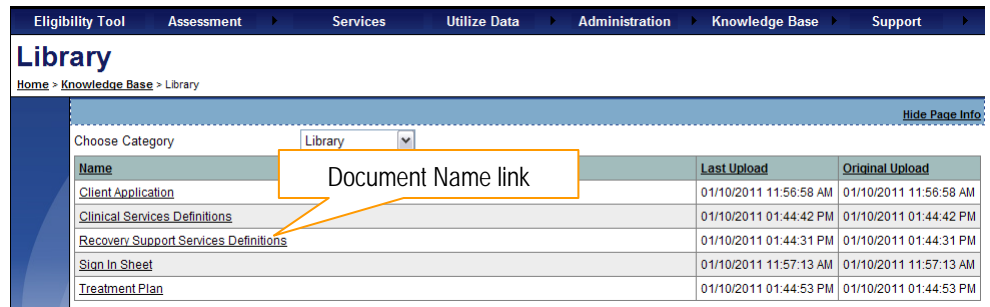
Tips

- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the websites.
- On the left column of the table is the Web Source link and on the right column of the table is a description of the website.

Library

The Library section is a repository of commonly requested documents and other general documents that ATR would like to make available. Use the following instructions to view the Library section.

1. Click **Knowledge Base** from the Menu.
2. Click **Library** from the Knowledge Base Landing Page
3. Select a category from the **Choose Category** dropdown list.
4. Select the document you would like to view by clicking the link of the document Name.
5. The document will open as a new word document.
 - a. Click the print button  to print the document.
 - b. Click the disk button  to save the document.
 - c. To close the .doc window, click on the  (X) in the upper right hand corner.



Name	Last Upload	Original Upload
Client Application	01/10/2011 11:56:58 AM	01/10/2011 11:56:58 AM
Clinical Services Definitions	01/10/2011 01:44:42 PM	01/10/2011 01:44:42 PM
Recovery Support Services Definitions	01/10/2011 01:44:31 PM	01/10/2011 01:44:31 PM
Sign In Sheet	01/10/2011 11:57:13 AM	01/10/2011 11:57:13 AM
Treatment Plan	01/10/2011 01:44:53 PM	01/10/2011 01:44:53 PM

(This is a screenshot of the Library Listing Page.)

Tips

- The documents in the Library section are updated at the state-level.

PID Directory

The PID Director section allows you to view details on the different program locations.

1. Click **Knowledge Base** from the Menu.
2. Click **PID Directory** from the Knowledge Base Landing Page
3. Click the **Select** (Select) button to left of the PID you wish to view.
4. The Program Location details will be displayed.

The screenshot displays the 'Location Directory' page within a web application. At the top is a dark blue navigation bar with links: Eligibility Tool, Assessment, Services, Administration, Knowledge Base, and Support. Below this is a white header area with the title 'Location Directory' and a breadcrumb trail: Home > Knowledge Base > Location Directory. A 'Back' button is located on the left side of the main content area. The main content area is divided into sections. The first section, 'PROGRAM LOCATION, HOURS AND CONTACT INFORMATION', contains a table with the following data: PID 'Training Org 1', Contact Person 'Jill, Hancharick', Address '5700 Corporate Drive', City 'Pittsburgh', Zip Code '15237', Region 'East Bay', Telephone Number '(412) 366-7188', and E-mail Address 'jhancharick@kitsolutions.net'. Below this table are two text input fields for service availability and directions. The second section is 'PROGRAM STAFF LANGUAGE FLUENCY' and the third is 'TARGET POPULATIONS SERVED'.

PROGRAM LOCATION, HOURS AND CONTACT INFORMATION			
PID Training Org 1		Contact Person for Referrals Jill, Hancharick	
Address where services are rendered 5700 Corporate Drive		City Pittsburgh	Zip Code 15237
		Region East Bay	
Telephone Number (412) 366-7188	Fax Number	E-mail Address jhancharick@kitsolutions.net	
Please list the days and hours this service is available to clients:			
Please provide directions including public transportation:			
PROGRAM STAFF LANGUAGE FLUENCY			
TARGET POPULATIONS SERVED			

(This is a sample screenshot of the Location Directory Page.)

SUPPORT

Web Site

The RI ATR Support Site offers several features to assist you with using the RI ATR application.


1. Click **Support** from the Menu.
2. Click **Web Site** from the Support Landing Page.
3. A new window will open displaying the Support Site.
4. To submit a problem, question, or suggestion for improvement, click the **Contact Support** link.
5. To find this manual in an online version, click the **Manuals** link. The Manuals page will open displaying various documents pertinent to the RI ATR application.
6. To see a list of new features, improvements, or announcements for the RI ATR application, click the **What's New** link.
7. To view frequently asked questions regarding the RI ATR application, click the **FAQs** link.
8. To view and download documents pertaining to the RI ATR application, click the **Library** link.

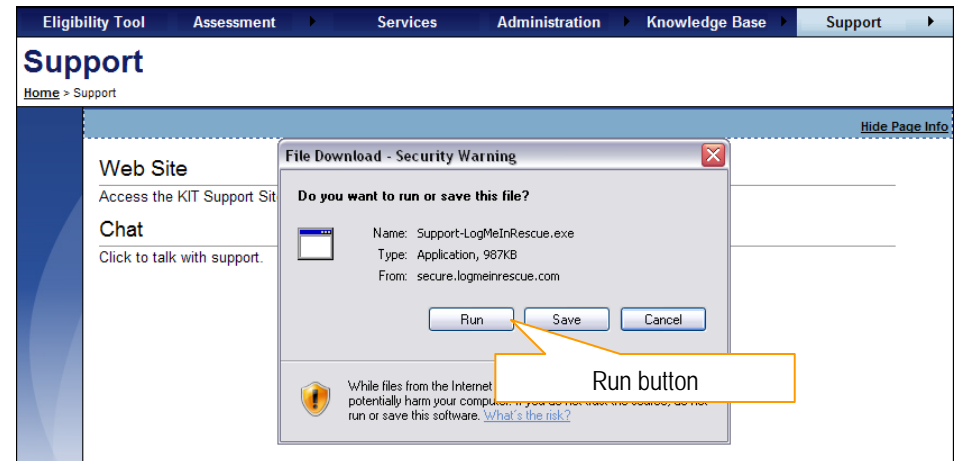


(This is a screenshot of the Support Site Home page.)

Chat

The Chat feature allows you to talk to a Support member via instant message. Please note that Support is only available via chat from 9:00AM-5:00PM (EST), Monday-Friday.

1. Click **Support** from the Menu.
2. Click **Chat** from the Support Landing Page.
3. A new window opens prompting you to run the LogMeInRescue application. You must run this application in order to utilize the chat feature. Click the  (Run) button.
4. A Support representative will be with you shortly.



(This is a sample screenshot of the LogMeIn file download message.)

Tips

- You will need to install the LogMeIn applet in order to connect with Support. This is a free download.
- The installation may take a few minutes.